



STATE OF NORTH DAKOTA

PROJECTS MANUAL

PEOPLESOFT
VERSION 8.4



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Disclaimer

Written by MAXIMUS, ERP Solutions Division, March 2014.

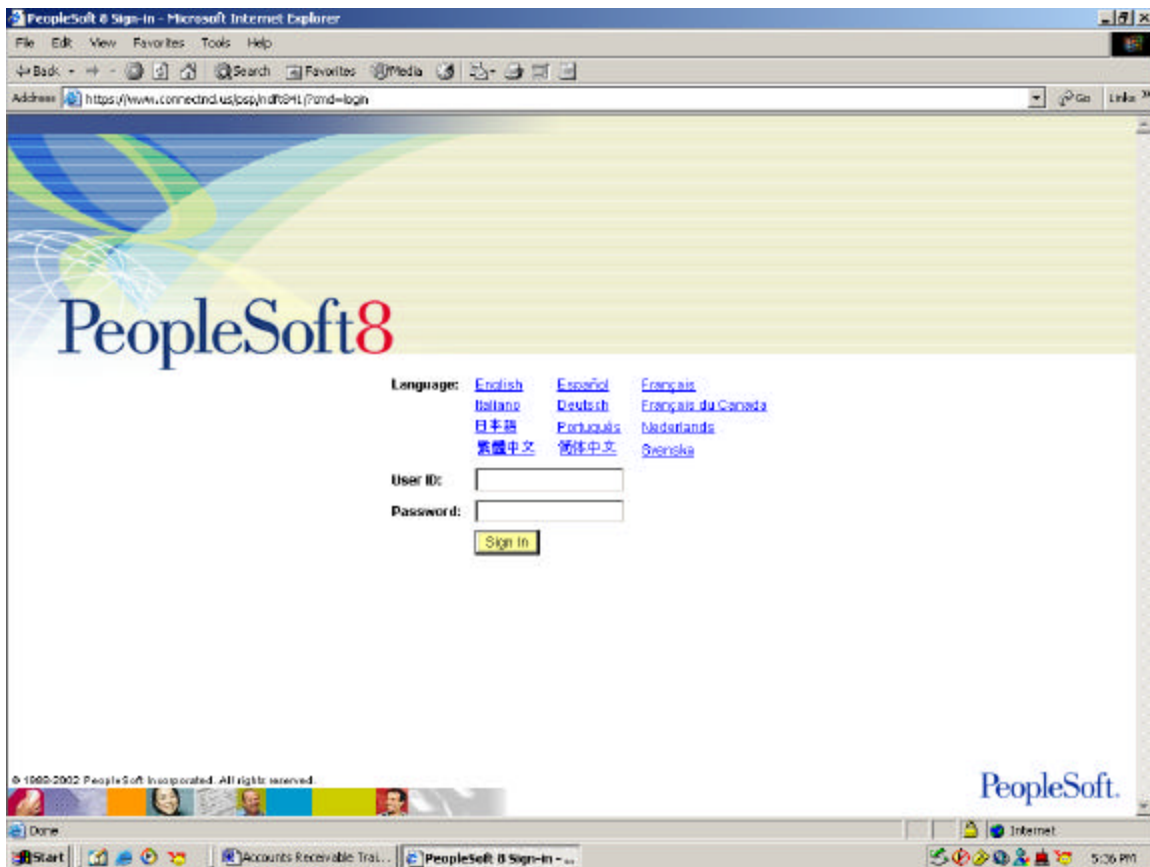
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Exclusion

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Signing into PeopleSoft

- Enter your unique User ID and Password.
- Click **Sign In**.




















Effective Dates within PeopleSoft

- **EFFECTIVE DATES** are very important in PeopleSoft. When you enter information, it is important that you effective date it with either the date that you entered the information, or a future/past date that the information became active. Therefore, if a customer has an address change effective the end of the current month. You can bring up the customer and ADD a new row using the **+** icon. It is important that you do not just change the current information in the system. This will lead to processing problems down the line

- since the information within the database is linked to each other. The proper way to add or change information is to add a new row and effective date it with the proper information. In our example above, you would effective date the new address with the date for the end of the month (when the move is to occur). PeopleSoft will choose which information to use based on the effective date that is the closed to the current date (not including future dates).
- **INACTIVATING** information within PeopleSoft also works with Effective Dates. If you wanted to inactivate a piece of information, you would bring up the customer and ADD a new row using the  icon. It is important that you do not just change the current status to INACTIVE in the system. This will lead to processing problems down the line since the information within the database is linked to each other. The proper way to Inactivate information is to add a new row and effective date. Change the new row's status to INACTIVE. In our example above, if you wanted to change the customer's old address, you would add a new line to the existing customer information. The new line would be used with the new effective date for which the new address is valid. You would then update the address accordingly. If there is not a change and you just want to inactivate an item in PeopleSoft, you would need to again add a new line with the appropriate effective date and change the status to INACTIVE. This way you retain history and processing does not have inactive information tied to it.
 - **CORRECTION MODE** should not be used to change information. The proper way to change information is by adding a new row with a new effective date.
 - **RUN CONTROLS**: It is important that you set up unique Run Controls for each different process that you will be running. If at any time your process fails over and over again, your Run Control could have become corrupted. At that time, create a new Run Control and rerun the process. Sometimes this will work. If not, contact your IT support person for help.

PeopleSoft Icons to Remember

-  **Search**: Will do a search based on searching criteria and bring up valid values.
-  **Clear**: Will clear the search dialog page of any values so that you can re-enter information.
- : Will bring up a list of valid values.
- : Will bring up a calendar that you can use to specify a date.
- : Click on the drop down box to see a list of valid values that you can choose from.
- [Hyperlink](#): Click on the hyperlink to go to the specified page.
-  **Save**: Will Save the page.

- **Refresh** : Will refresh the data on the Process Monitor.
- **Process** : Will initiate the process specified.
-  **Return to Search** : Will return to the search dialog page.
-  **Next in List** : Will show the next entry in the list.
-  **Add** : Will add another value.
-  : Will add another line.
-  : Will delete another line.
- **Totals**  **Find** | **View All** **First**  **1 of 1**  **Last**
: Will allow you to view all or selected lines.
- **Select All** : Will select all values in the list.
- **Deselect All** : Will deselect all values in the list.
- [New Window](#) : Will open a new PeopleSoft Internet page.
- **Run** : Will run the process.
- **Lookup** : Will perform a search based on the searching criteria.
-  : Will refresh or build the page.
-  : Will create entries.
-  : Will delete entries.

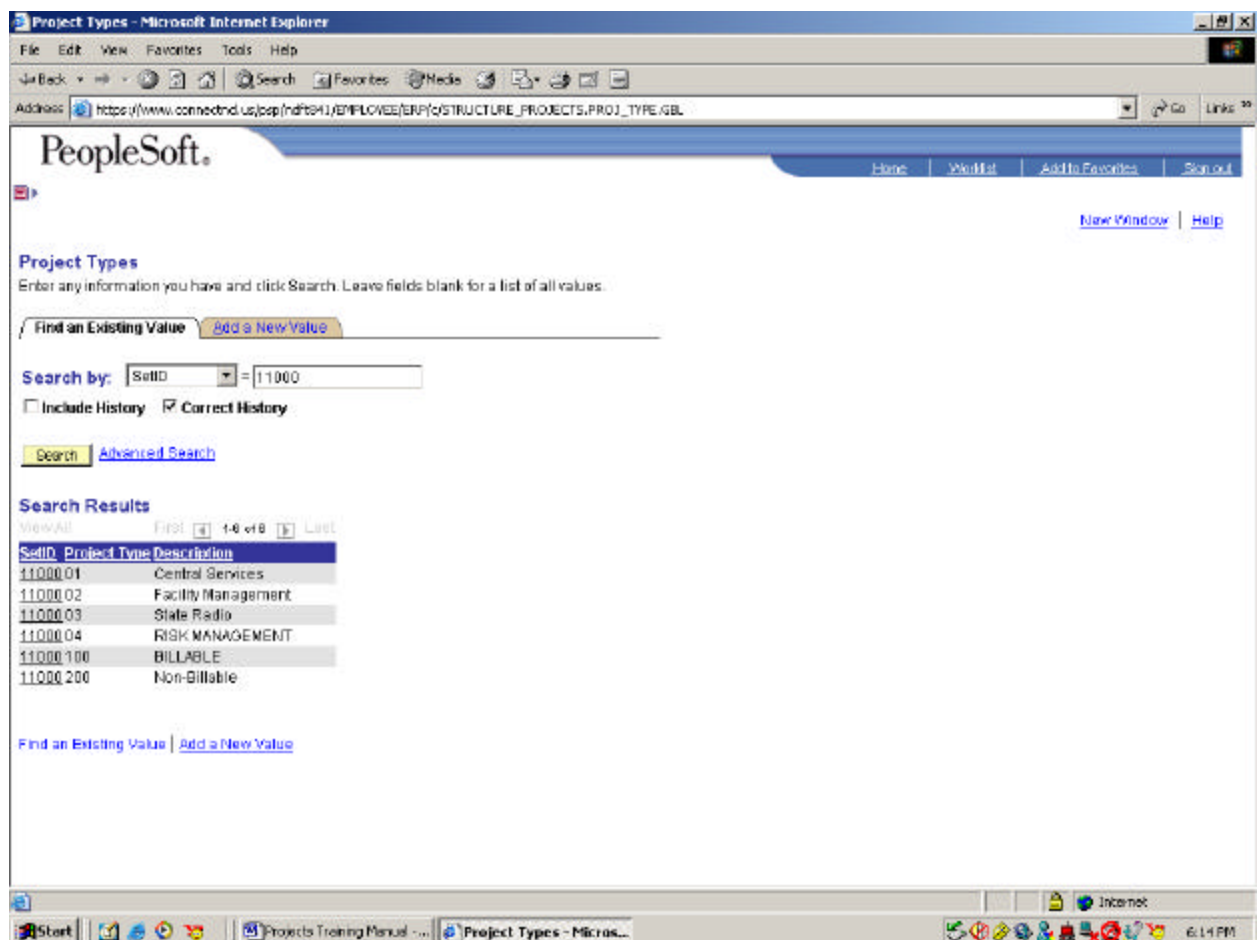
Projects Setup

Defining Project Types

- Project types are markers to help you organize your projects.
- When you assign a project type to your individual projects, then you can analyze a group of projects in relation to each other.

Note: If the project will be using 'Standard Activities', you must select a project type.

Setup Financials / Supply Chain > Product Related > Projects > Project Options > Project Type



- Click on the Add a New value tab to add a new Project Type.

Project Types - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/q/STRUCTURE_PROJECTS.PROJ_TYPE.GBL

PeopleSoft®

Home What's New Add to Favorites Sign out

New Window Help

Project Types

Find an Existing Value Add a New Value



SetID: 11000

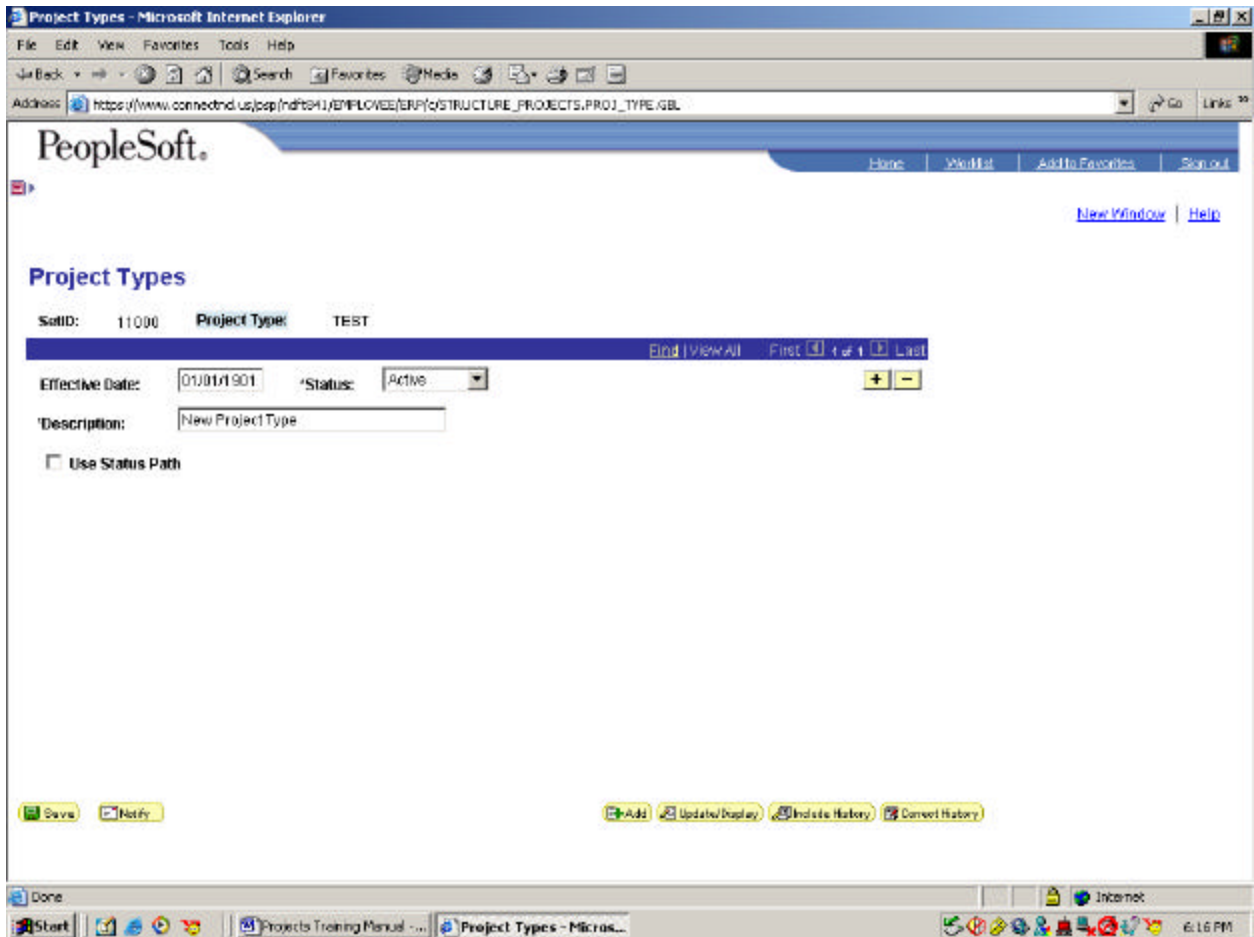
Project Type: TEST

Add

Find an Existing Value Add a New Value

Start Projects Training Manual - ... Project Types - Micros... 6:14 PM

- Business Unit: Project Business Unit. Click on the magnifying glass icon  to see a list of valid values.
- Project Type: Enter the Project Type identifier.
- Click .



Project Types - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/STRUCTURE_PROJECTS.PROJ_TYPE.GBL

PeopleSoft.

Home What's New Add to Favorites Sign out

New Window Help

Project Types

SOLID: 11000 Project Type: TEST

End | View All First Previous Next Last

Effective Date: 01/01/1901 Status: Active

Description: New Project Type



☐ Use Status Path

Save Notify Add Update/Display Inactivate History Connect History

Done

Start Projects Training Manual - ... Project Types - Micros...

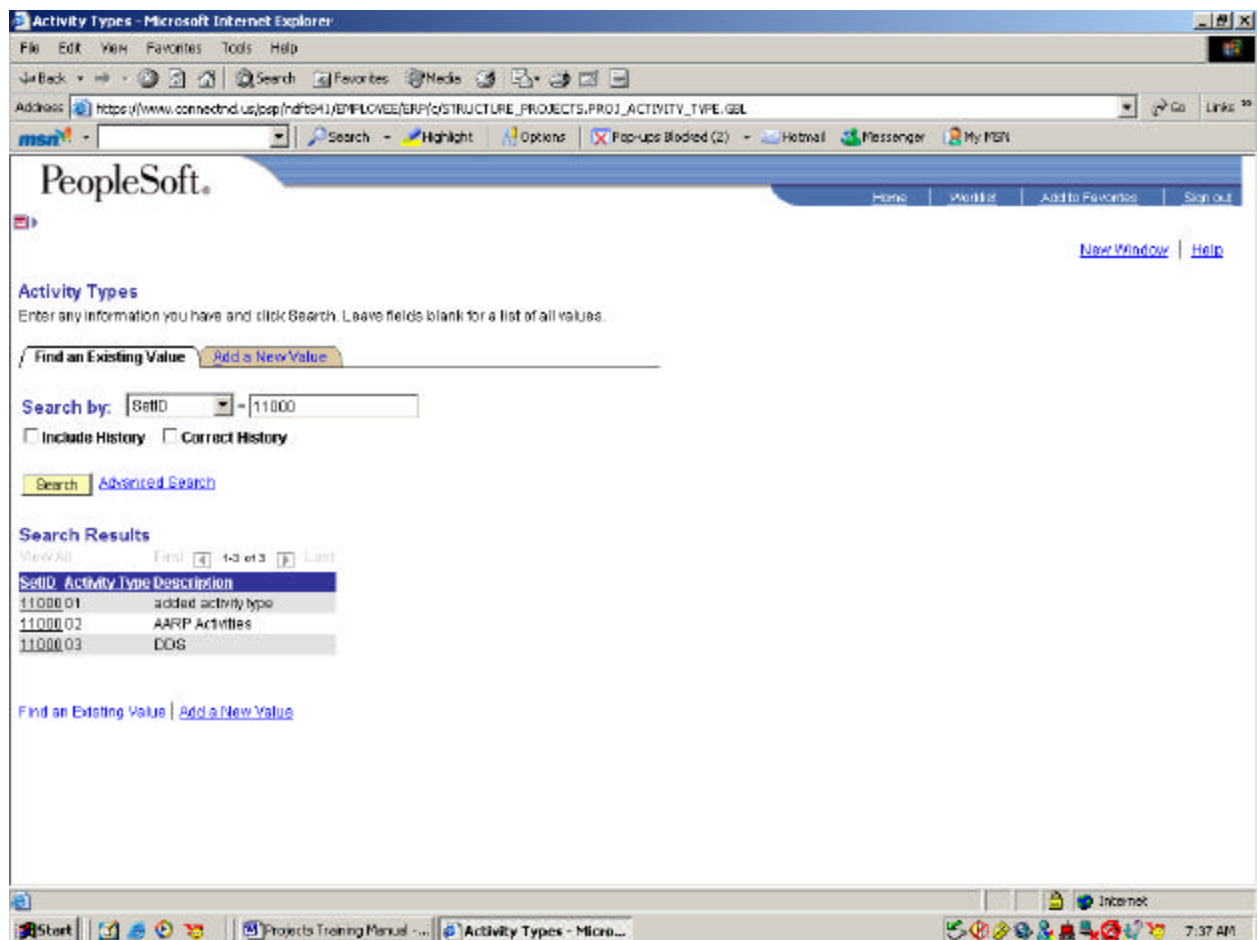
Internet 6:16 PM

- Effective Date: Enter the appropriate effective date.
- Status: Active (If you want to inactivate this Project type, add a new row using the add icon  and change the status to inactive. Make sure that the new inactive row has an appropriate effective date.)
- Description: Enter the appropriate description.
- Click  Save.

Defining Activity Types

- Activity Types are labels that identify and group activities to facilitate analysis and reporting.

Setup Financials / Supply Chain > Product Related > Projects > Activity Options > Activity Type



- Click on the Add a New value tab to add a new Project Type.

Activity Types - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/STRUCTURE_PROJECTS.PROJ_ACTIVITY_TYPE.GBL

PeopleSoft®

Home World of Add to Favorites Sign out

[New Window](#) [Help](#)

Activity Types

[Find an Existing Value](#) [Add a New Value](#)

SetID: 11000

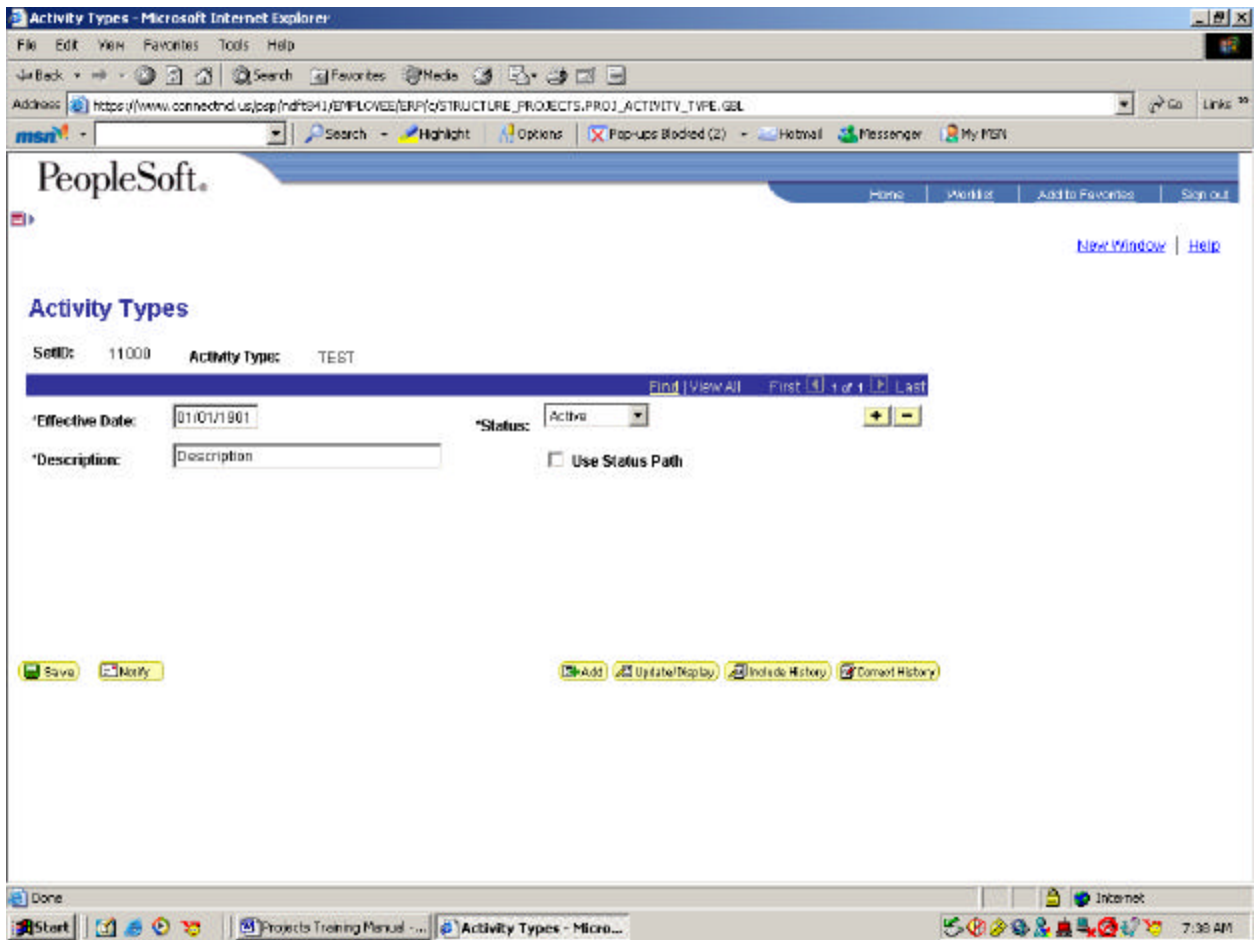
Activity Type: TEST



[Add](#)

[Find an Existing Value](#) [Add a New Value](#)

Start Projects Training Manual - ... Activity Types - Micro... 7:37 AM

- Business Unit: Project Business Unit. Click on the magnifying glass icon to see a list of valid values.
- Activity Type: Enter the Activity Type identifier.
- Click [Add](#).

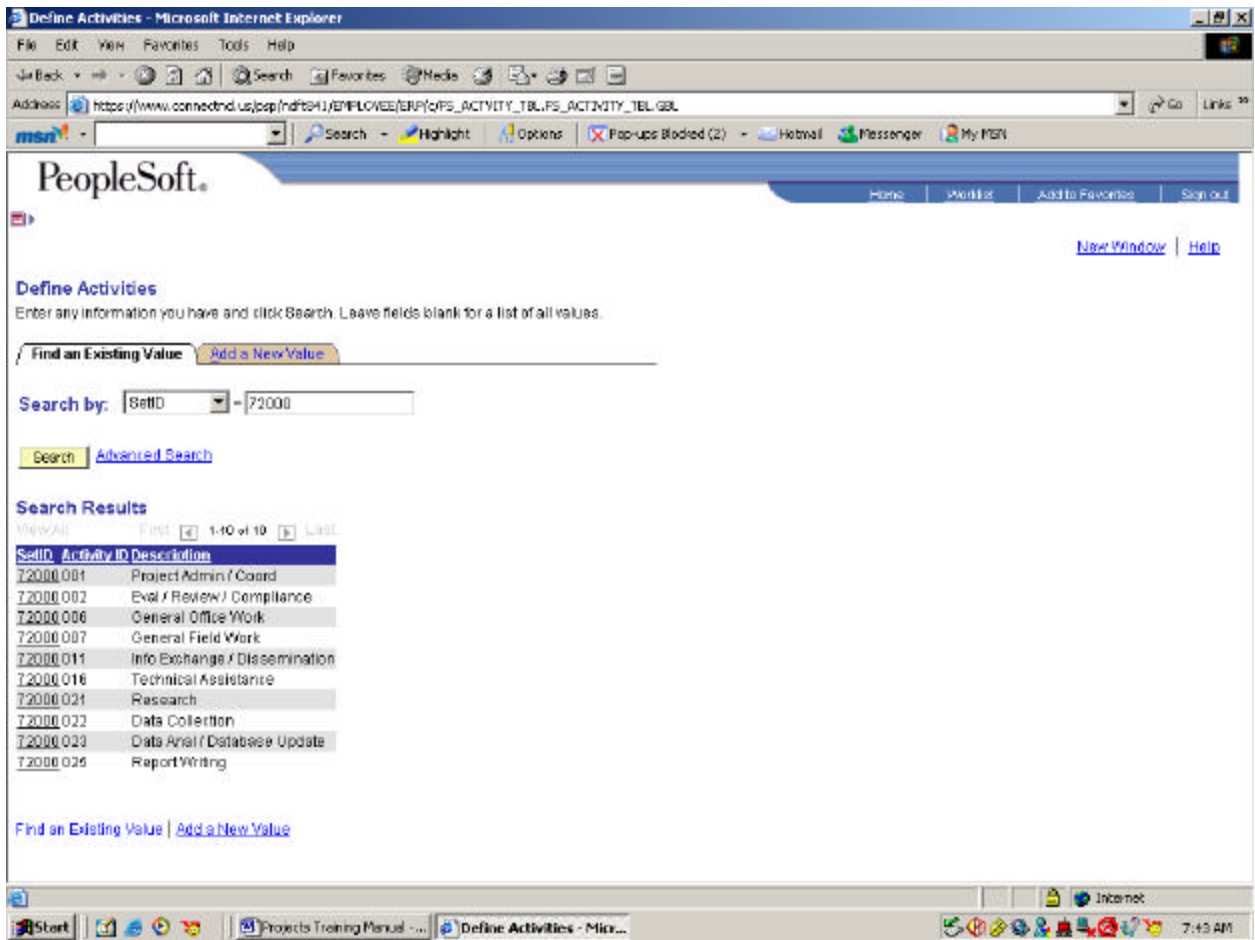


- Effective Date: Enter the appropriate effective date.
- Status: Active (If you want to inactivate this Activity Type, add a new row using the add icon  and change the status to inactive. Make sure that the new inactive row has an appropriate effective date.)
- Description: Enter the appropriate description.
- Click  Save.

Standard Activities

- An organization may, for reporting or analysis purposes, want to limit the number and types of activities that can be assigned to a project.
- When users want to assign an activity to a project, they are limited to assigning only standard activities that have been predefined using the Activity page.
- Standard activities are keyed by SetID and based on project type.
- The project types must be set up first to be selected here.
- To enable standard activity functionality for a Project, check the Standard Activity box on the Projects General - Definition page. Projects will then be only allowed to pick from the pre-defined list of standard activities and will not be able to create activities ad-hoc on the Activities page.

Setup Financials / Supply Chain > Common Definitions > Activities > Define Activities



Define Activities
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | [Add a New Value](#)

Search by: SetID = 72000

[Search](#) | [Advanced Search](#)

Search Results
View All | First | 1-10 of 10 | Last

SetID	Activity ID	Description
72000	001	Project Admin / Coord
72000	002	Eval / Review / Compliance
72000	006	General Office Work
72000	007	General Field Work
72000	011	Info Exchange / Dissemination
72000	016	Technical Assistance
72000	021	Research
72000	022	Data Collection
72000	023	Data Anal / Database Update
72000	029	Report Writing

[Find an Existing Value](#) | [Add a New Value](#)

- Click on the Add a New Value tab.

Define Activities - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/PS_ACTIVITY_TBL.PS_ACTIVITY_TBL.GBL

PeopleSoft®

Home World of Add to Favorites Sign out

Define Activities

Find an Existing Value Add a New Value

SetID: 72000

Activity ID: TE8T



Add

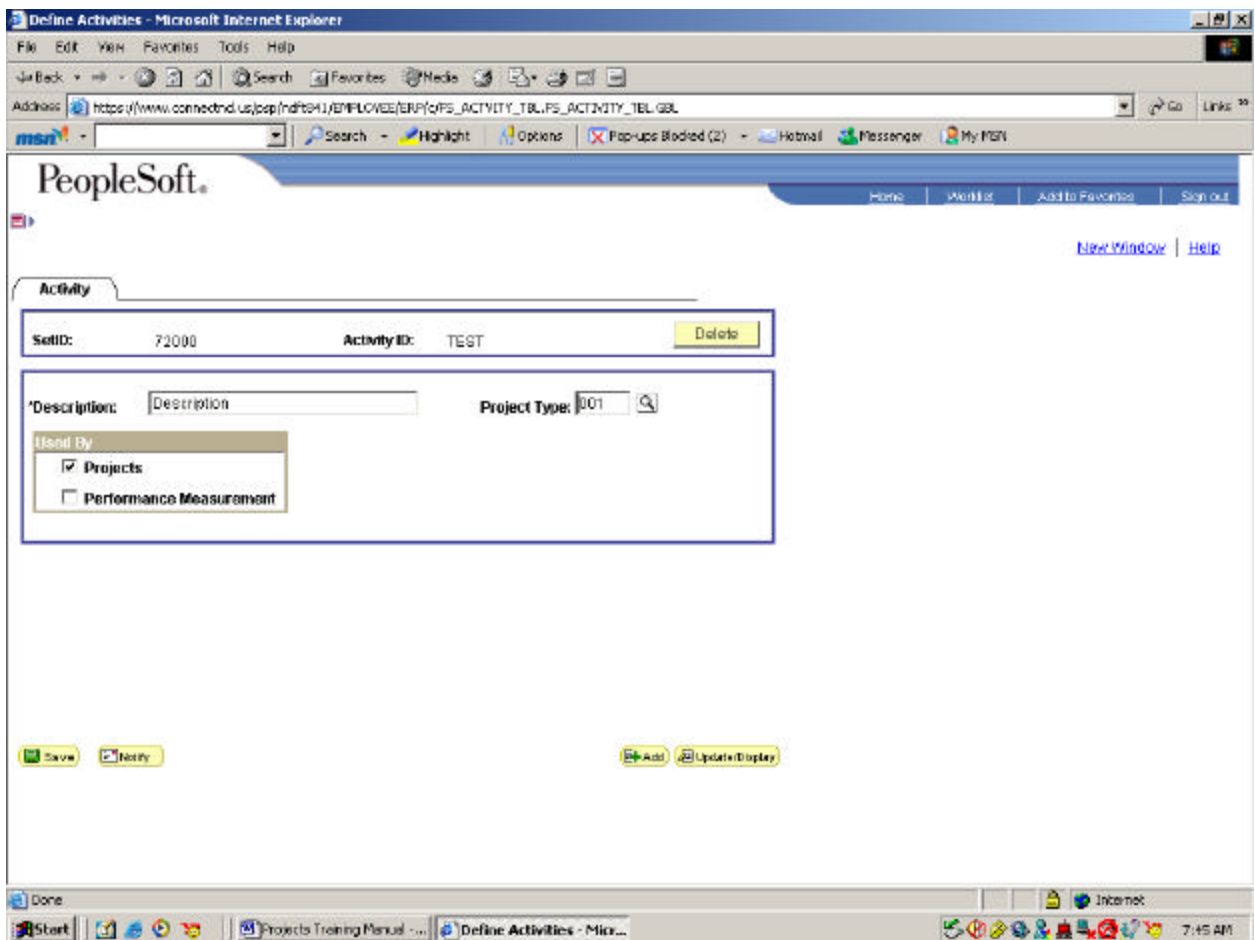
Find an Existing Value Add a New Value

Done

Start Projects Training Manual Define Activities - Mic...

Internet 7:44 AM

- SetID: Project Business Unit. Click on the magnifying glass icon  to see a list of valid values.
- Activity ID: Enter the Activity ID identifier.
- Click .



Define Activities - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/psp/ndf0241/EMPLOYEE/EMP/APS_ACTIVITY_TBL.PS_ACTIVITY_TBL.GBL

PeopleSoft

Home World Add to Favorites Sign out

New Window Help

Activity

SetID: 72000 Activity ID: TEST Delete

Description: Description Project Type: 001

Used By

☒ Projects



☐ Performance Measurement

Save Notify Add Update/Display

Done

Start Projects Training Manual Define Activities - Mic...

7:45 AM

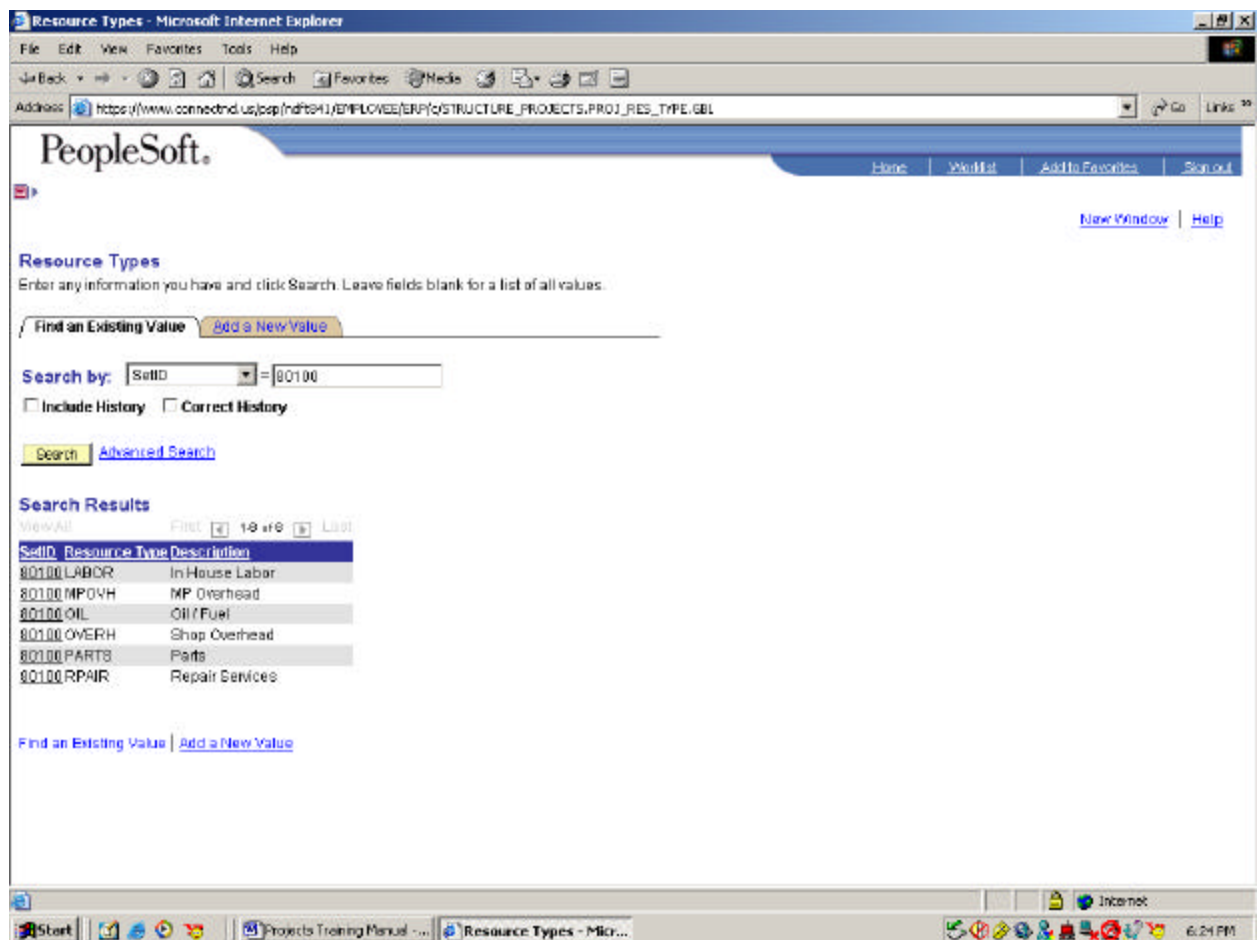
- Description: Enter the appropriate description.
- Project Type: Required. Click on the magnifying glass icon  to see a list of valid values.
- Used by Projects: Check this box.
- Click .

Resource Types

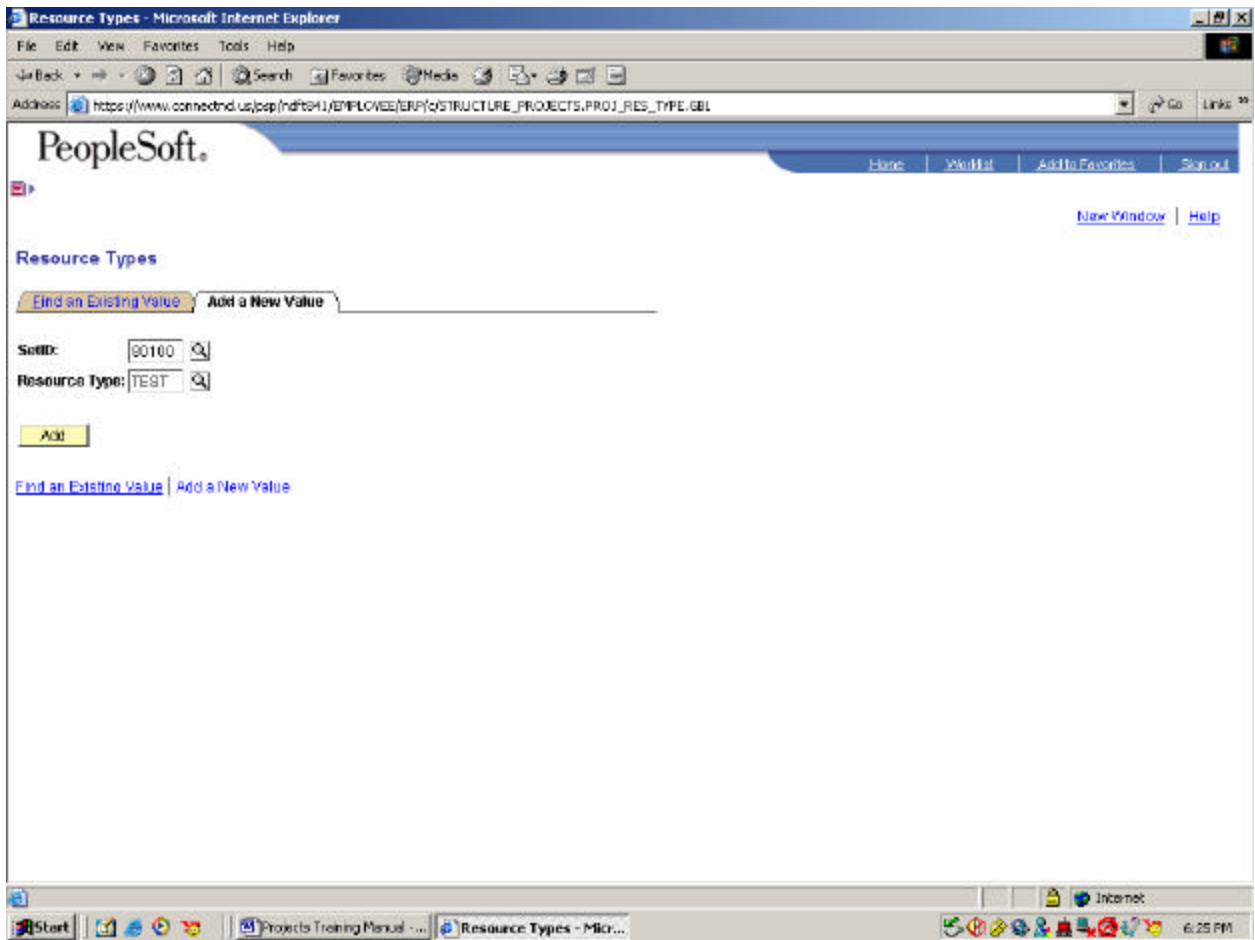
- Resource Types are optional, user-defined fields assigned to individual resource rows.
- They are used to further identify the transactions.


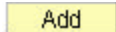
Note: Currently only DOT and Game and Fish will use Resource Types.

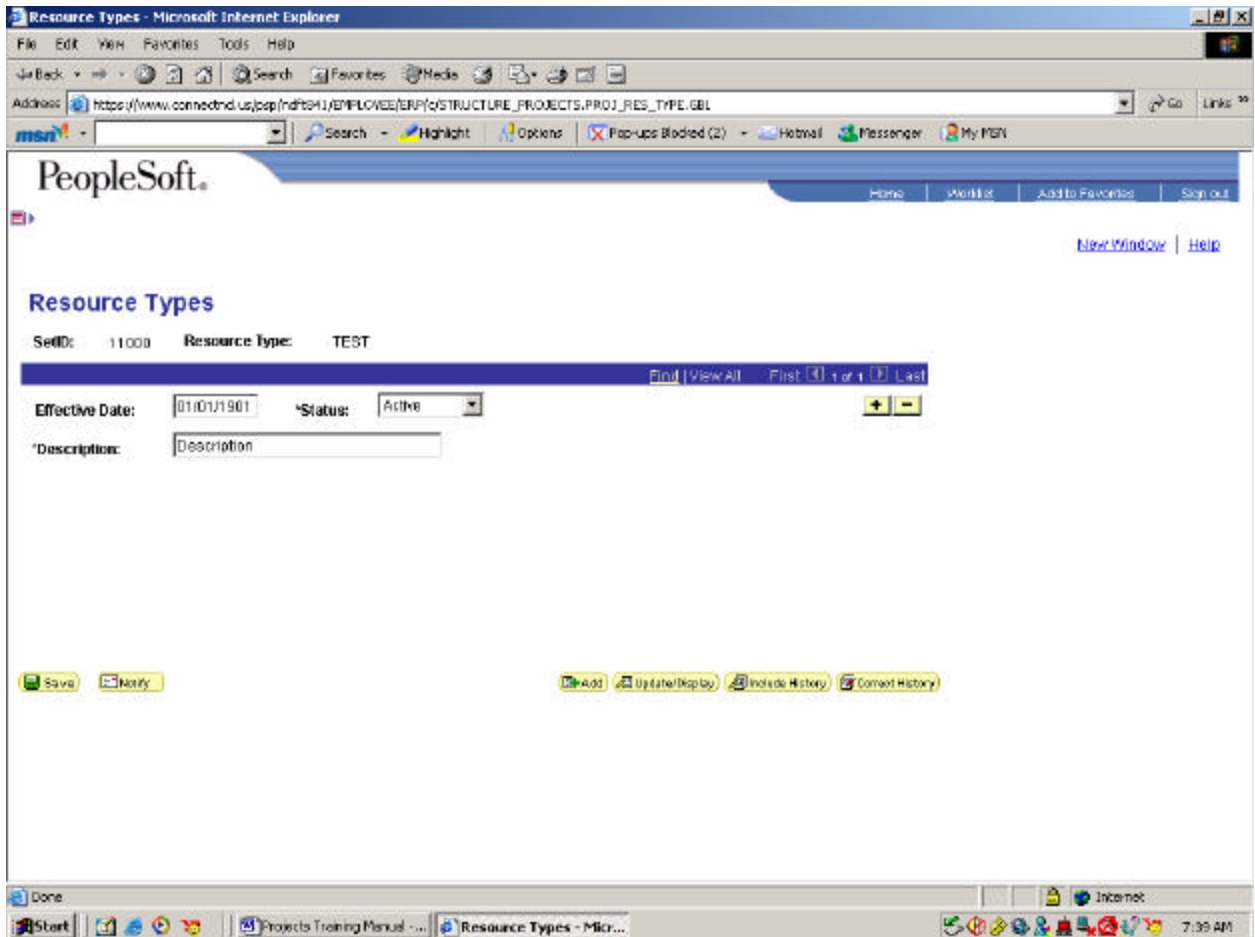
Setup Financials / Supply Chain > Product Related > Projects > Resources > Resource Types



- Click the Add a New Value tab to add a new Resource Type.



- SetID: Projects Business Unit. Resource Types are setup at the Business Unit level. Click on the magnifying glass icon  to see a list of valid values.
- Resource Type: Enter the Resource Type identifier.
- Click .



Resource Types - Microsoft Internet Explorer

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/STRUCTURE_PROJECTS.PROJ_RES_TYPE.GBL

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Home Worklist Add to Favorites Sign out

Resource Types



SetID: 11000 Resource Type: TEST

Find View All First 1 of 1 Last

Effective Date: 01/01/1901 *Status: Active + -

Description: Description

Save Notify Add Update/Display Include History Correct History

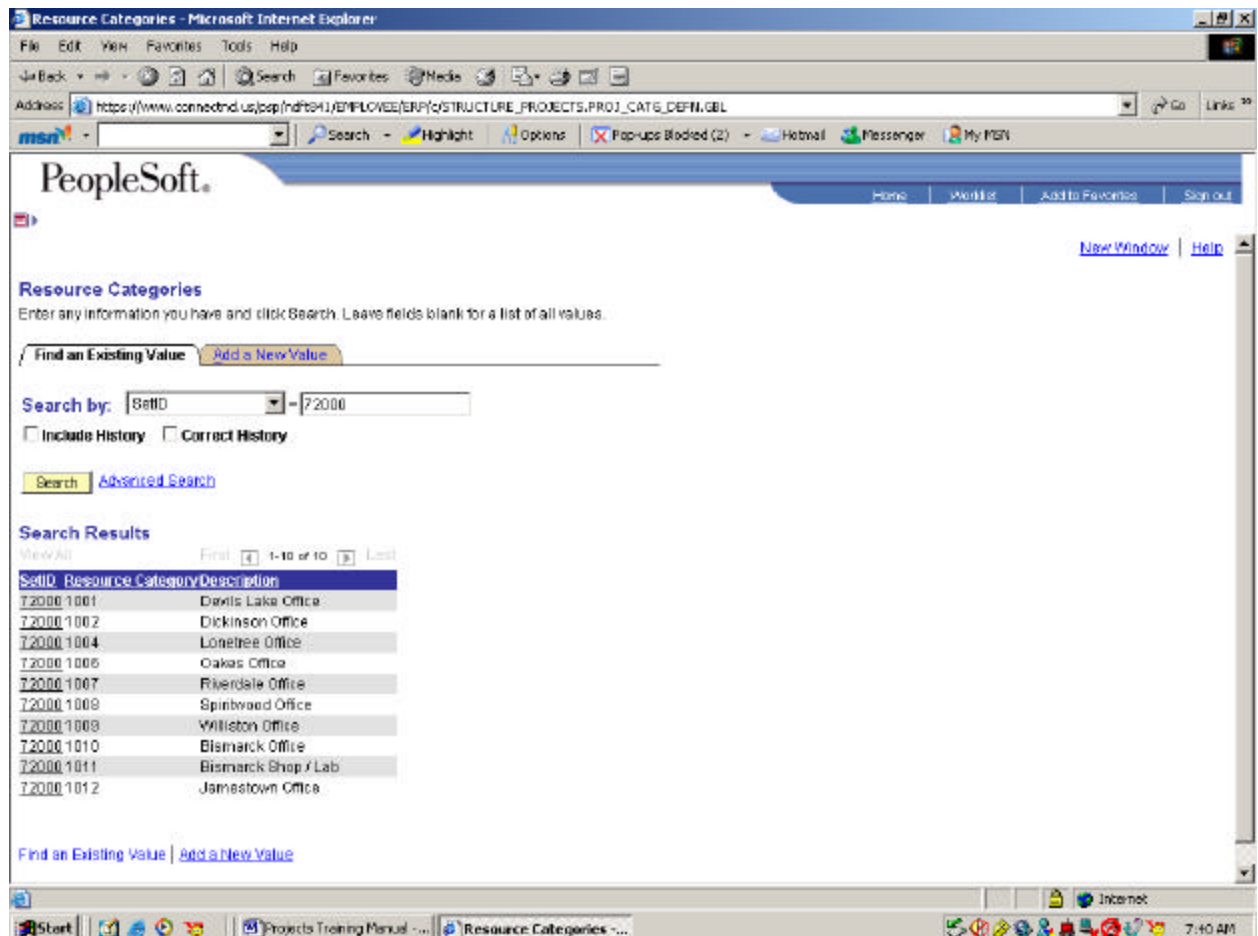
- Effective Date: Enter the appropriate effective date.
- Status: Active (If you want to inactivate this Resource type, add a new row using the add icon  and change the status to inactive. Make sure that the new inactive row has an appropriate effective date.)
- Description: Enter the appropriate description.
- Click  .

Resource Categories and Subcategories

- Resource Categories and Subcategories are optional fields and allow you to further differentiate your resource rows.

Setup Financials / Supply Chain > Product Related > Projects > Resources > Resource Category / Resource SubCategory

Note: Currently only Game and Fish will use Resource Categories.



- Click on the Add a New Value tab.

Resource Categories - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/q/STRUCTURE/PROJECTS/PROJ_CATG_DEFN.GBL

msn Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My PSN

PeopleSoft®

Home Worklist Add to Favorites Sign out

New Window Help

Resource Categories

Find an Existing Value Add a New Value


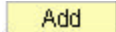
SetID: 72000

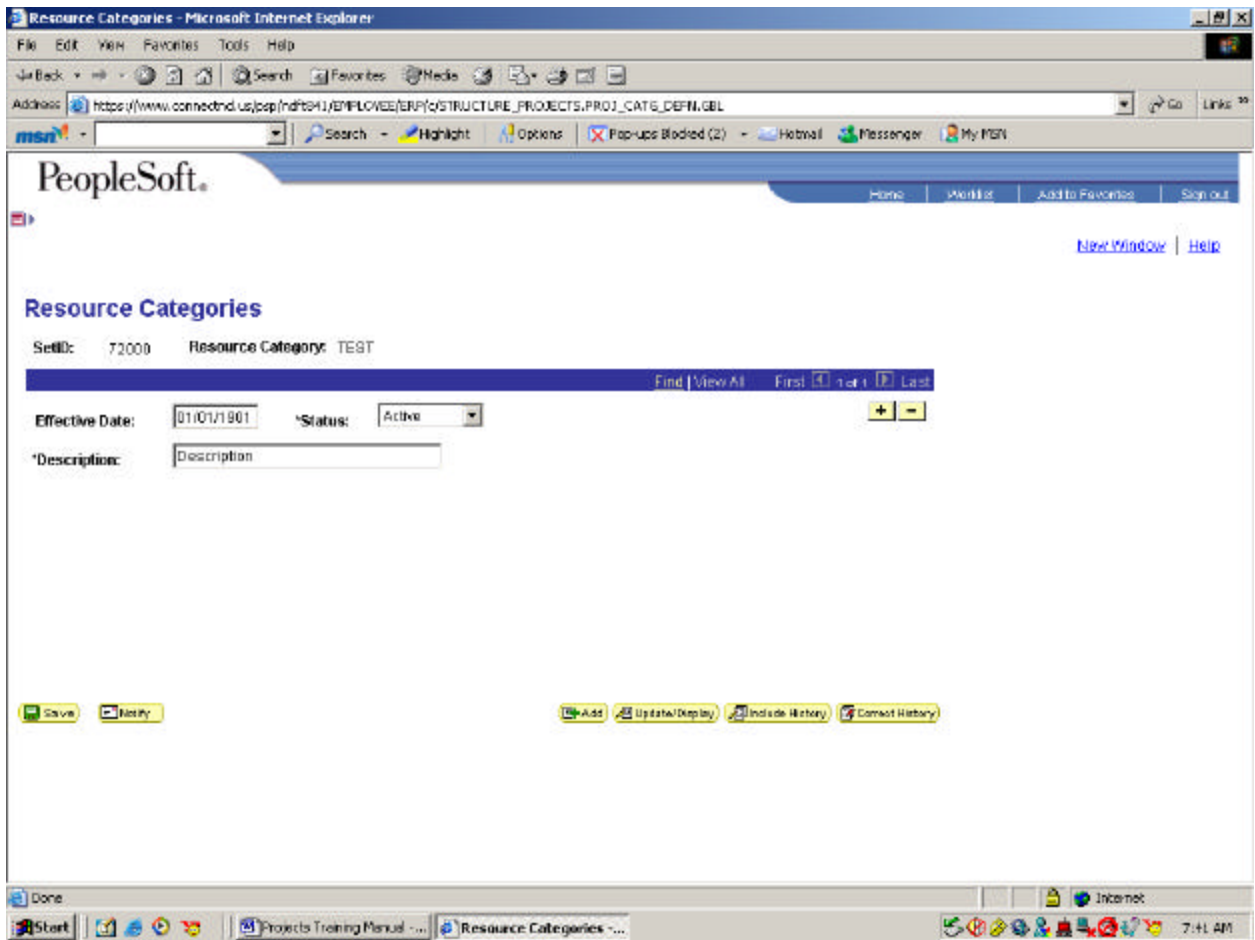
Resource Category: TEST

Add

Find an Existing Value Add a New Value

Start Projects Training Manual Resource Categories 7:41 AM

- SetID: Projects Business Unit. Resource Categories are setup at the Business Unit level. Click on the magnifying glass icon  to see a list of valid values.
- Resource Category: Enter the Resource Category identifier.
- Click .



Resource Categories - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf0341/EMPLOYEE/EMP/q/STRUCTURE_PROJECTS.PRO1_CAT6_DEFN.GBL

Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My PSN

PeopleSoft® Home Worklist Add to Favorites Sign out

New Window Help

Resource Categories

SetID: 72000 Resource Category: TEST



Find View All First 4 Next 2 Last

Effective Date: 01/01/1901 *Status: Active + -

*Description: Description

Save Notify Add Update/Display Include History Correct History

Done Start Projects Training Manual -... Resource: Categories -... 7:41 AM

- Effective Date: Enter the appropriate effective date.
- Status: Active (If you want to inactivate this Resource Category, add a new row using the add icon  and change the status to inactive. Make sure that the new inactive row has an appropriate effective date.)
- Description: Enter the appropriate description.
- Click  .

Analysis Types

- Analysis Types are assigned to individual resource rows to identify the different types of transactions in your system.
- While most of the Analysis Types you will use are delivered with the system, you can set up your own or update the existing types.
- The following analysis types are necessary in order for PeopleSoft Projects analysis groups, reports, and processes to function properly.
- Adding Analysis Types will be done by OMB.

Analysis Type	Description	Analysis Type	Description
ACT	Actual Cost	GLE	General Ledger Expense
BAJ	Billing Adjustment	GLR	General Ledger Revenue
BD1	Total Cost Budget - Scenario 1	GNT	Grant Reimbursement
BD2	Total Cost Budget - Scenario 2	OLT	Over Limit Amount
BD3	Total Cost Budget - Scenario 3	ORD	Order
BD4	Total Cost Budget - Scenario 4	PAY	Time and Labor Actual
BD5	Total Cost Budget - Scenario 5	PCA	Profile Adjustment
BD6	Total Cost Budget - Scenario 6	PCL	Profile Cost Summary
BD7	Total Cost Budget - Scenario 7	PFS	Proceeds from Sale of Asset
BD8	Total Cost Budget - Scenario	PSD	Purchase/Sold Time Discount

BIL	Billable Amount	PSR	Proceeds from Sale Summary
BLD	Billed Amount	PST	Purchase/Sold Time
BRT	Billing Retainage	FTC	Forecast Cost to Complete
BUD	Total Cost Budget	RAJ	Released Retainage Adjustment
CBA	Cost Budget Adjustment	REB	Rebate
CCA	Closed Commitment Adjustment	REQ	Requisition
CLS	Asset Cost Summary	RET	Retirement Cost
COM	Commitment including Purchase Order & Subcontractor	REV	Revenue
COR	Cost of Removal of Asset	RRT	Released Billing Retainage
CRR	Cost of Removal Cost Summary	RRV	Requisition Reversal
CRV	Commitment Reversal	SHD	Shared Discount
CST	Costing	SHR	Shared Revenue
DEF	Deferred Amount	SUT	Sales/Use Tax
DSC	Billing Discount	TLA	Time and Labor Estimate
EMP	Projects Employee Time	TLB	Time and Labor Estimate for Billing
ESB	Engagement Plan Bill Estimate	TLC	Time and Labor Contractors
ESC	Engagement Plan Cost Estimate	TLX	Cost from Time Traveler
FBD	Fixed Cost Billed Amount	UAJ	Prepaid Utilization Adjustment

FCC	Completion Cost	UTL	Prepaid Utilization (Billing)
FND	Fund Distribution	WTO	Write Off
FRV	Fixed Cost Revenue Amount		

Analysis Groups

- Over the life of a project, you will accumulate a large number of resource rows. Analysis Groups help organize and manage these rows, by allowing you to group your rows for use in viewing, reporting and processing.
- An Analysis Group is made up of one or more Analysis Type.
- Well-designed Analysis Groups will help you create meaningful reports.
- Creating or changing an Analysis Group will be done by OMB.

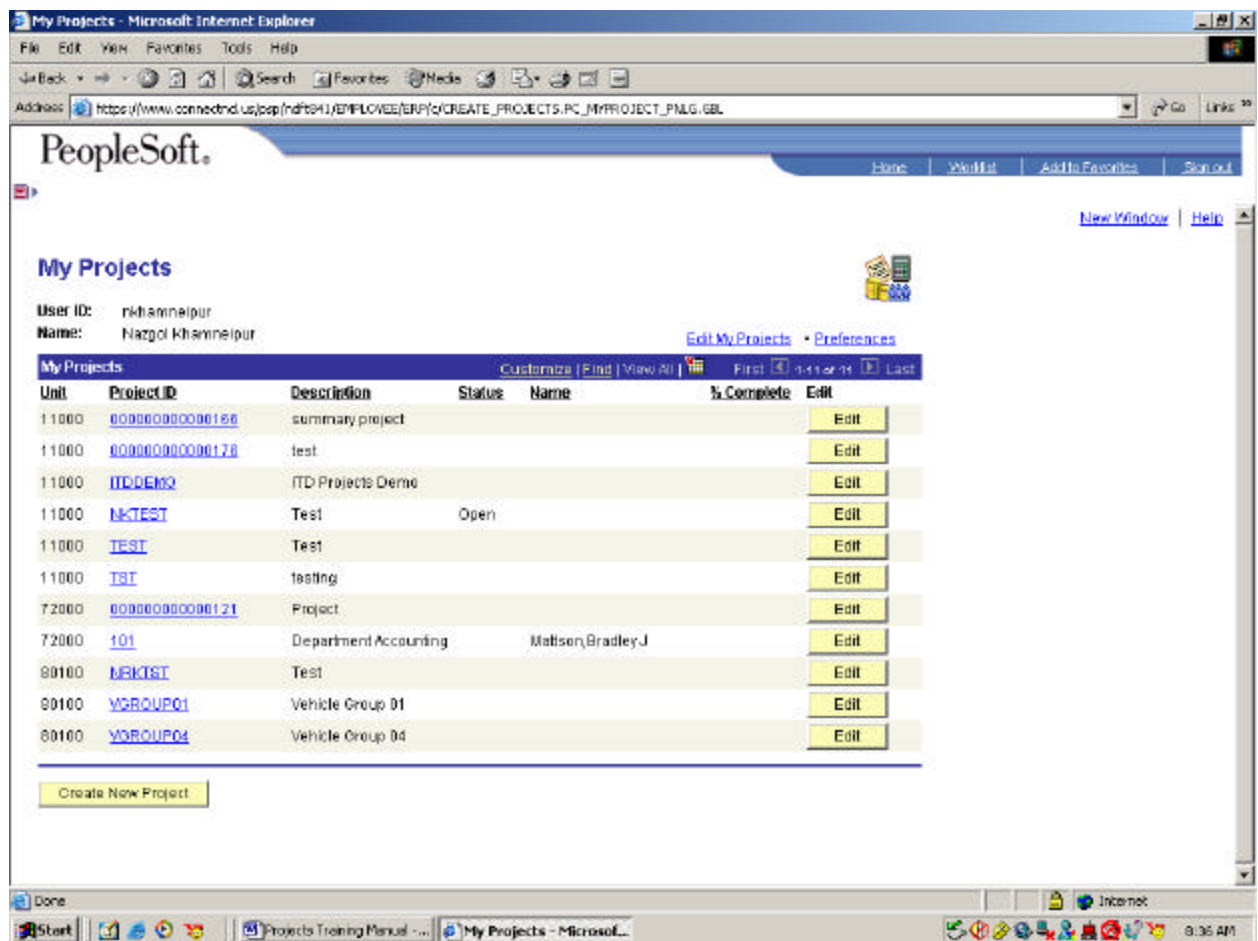
Analysis Group	Description	Analysis Group	Description
ACT	Actual Cost	PCADJ	Projects to Asset Management Profile Adjustment
ALL	All Analysis Types	POADJ	Purchasing Adjustments
AMRET	Asset Management - Retire proceeds and costs	PRECL	Projects to Asset Management Profile Summary
BLD	Billed transactions - Worksheet to PROJ_RESOURCE	PSBLD	Billing to Projects
BUD	Budgets	PSLMT	Limit Processing
CLOSE	Projects to Asset Management Asset Summary	PSREV	System Revenue
Copy	Template Copy	PSTDR	Purchase Sold Time/Discounts Reporting
Costs	Estimated and Actual Costs	PSWKS	Billing Worksheet Grouping

FOR2C	Forecast Cost at Completion	RETIR	Projects to Asset Management Retirement Costs
GL	General Ledger Analysis Types	UNBLD	Unbilled Transactions
OPENC	Open Commitment Balance	VARY	Variance

My Projects

- You can use the “My Projects” page to create a list of projects you frequently access, and to set your user preferences for default values in fields.
- This greatly reduces the time needed to find and access the projects you are monitoring.

Projects > Personalize > My Projects



My Projects

User ID: nkhamnelpur
Name: Nazgol Khamnelpur

[Edit My Projects](#) • [Preferences](#)

Unit	Project ID	Description	Status	Name	% Complete	Edit
11000	00000000000186	summary project				Edit
11000	00000000000178	test				Edit
11000	ITDDEMO	ITD Projects Demo				Edit
11000	NKTEST	Test	Open			Edit
11000	TEST	Test				Edit
11000	TST	testing				Edit
72000	00000000000121	Project				Edit
72000	101	Department Accounting		Mattison, Bradley J		Edit
80100	NRKTEST	Test				Edit
80100	VGRROUP01	Vehicle Group 01				Edit
80100	VGRROUP04	Vehicle Group 04				Edit

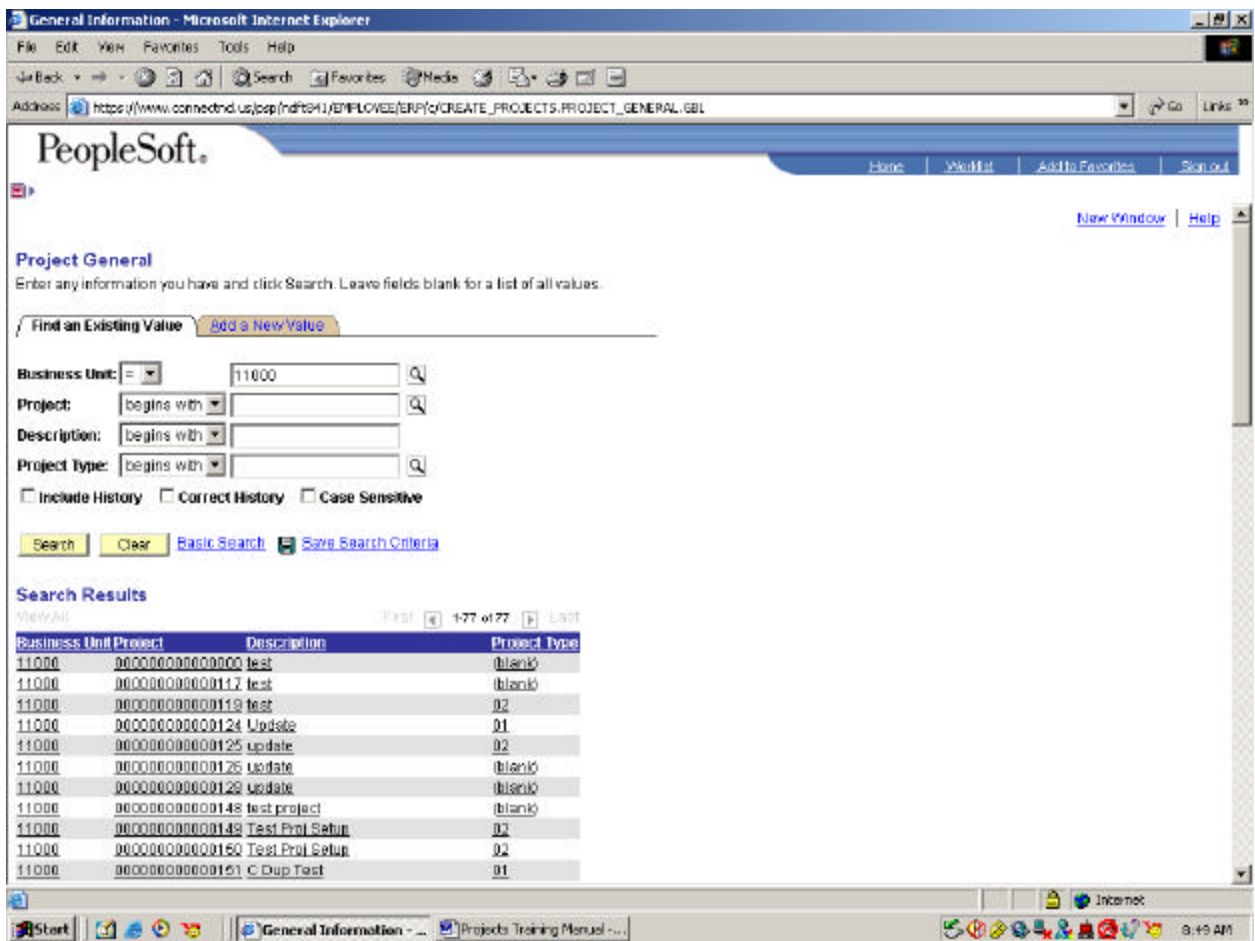
[Create New Project](#)

- Click on [Preferences](#) hyperlink.

Adding a Project to “My Projects” Page

- The easiest way to find a project and add it to your list is from the General Information link.
- Consequently, you can also add projects to the My Projects page by clicking on the [Edit My Projects](#) hyperlink on the My Projects page. (See below for more details)

Projects > Projects > General Information



Project General
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value



Business Unit: [dropdown] [11000] [magnifying glass icon]
 Project: [begins with] [] [magnifying glass icon]
 Description: [begins with] [] [magnifying glass icon]
 Project Type: [begins with] [] [magnifying glass icon]

☐ Include History ☐ Correct History ☐ Case Sensitive

[Search] [Clear] [Basic Search] [Save Search Criteria]

Search Results
View All First 177 of 77 Last

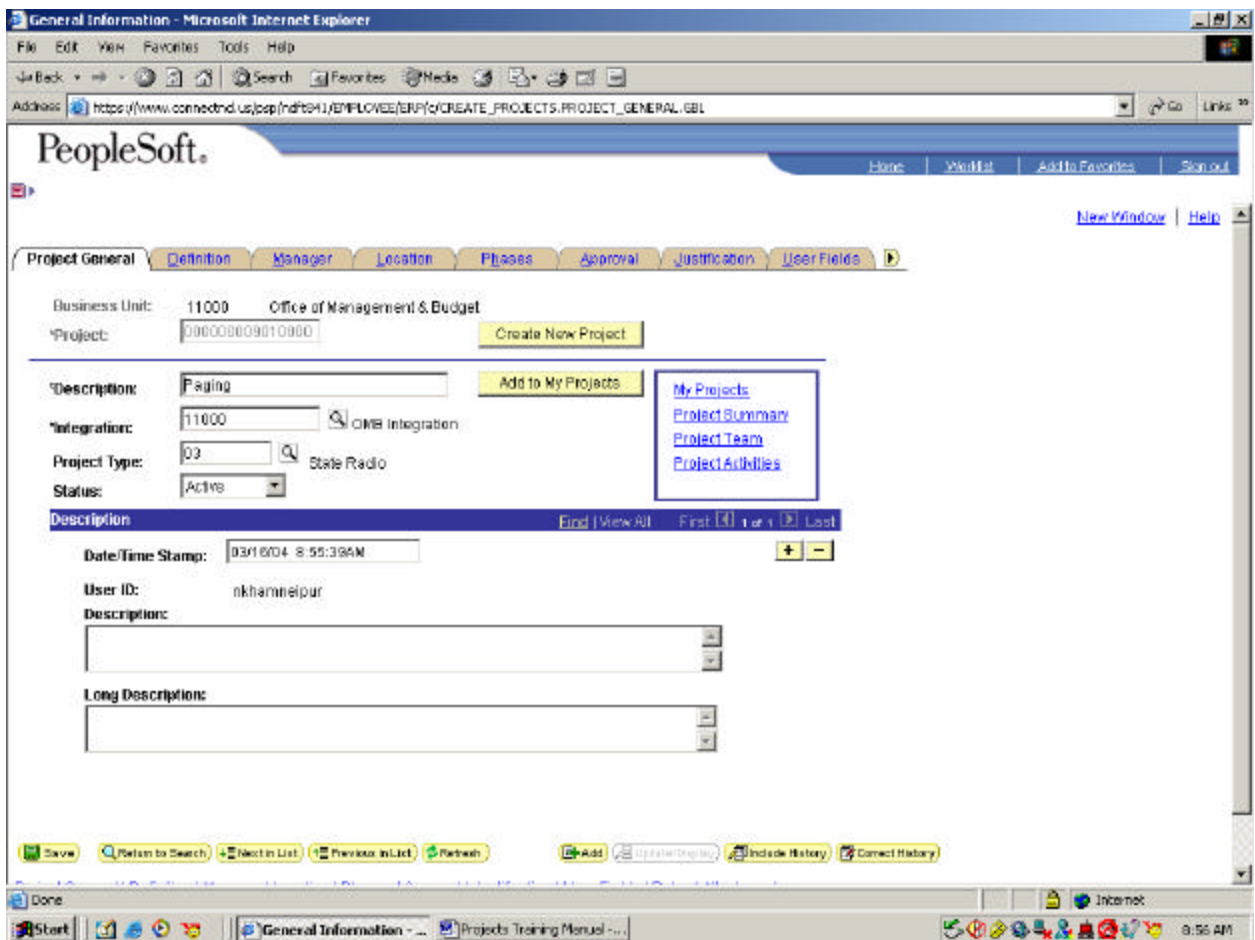
Business Unit	Project	Description	Project Type
11000	0000000000000000	test	(blank)
11000	00000000000112	test	(blank)
11000	00000000000113	test	02
11000	00000000000124	Website	01
11000	00000000000125	update	02
11000	00000000000126	update	(blank)
11000	00000000000129	update	(blank)
11000	00000000000148	test project	(blank)
11000	00000000000149	Test Proj Setup	02
11000	00000000000150	Test Proj Setup	02
11000	00000000000151	C Dup Test	01

- Business Unit: Projects Business Unit. Click on the magnifying glass icon  to select from valid values.
- Project: Enter the Project ID – if known. Click on the magnifying glass icon  to select from valid values.
- Description: Enter the Project Description – if known.

- Project Type: Enter the Project Type – if known. Click on the magnifying glass icon  to select from valid values.

Note: If the project will be using 'Standard Activities', you must select a project type.

- Click **Search** to pick from the returned list of Projects that fit your search criteria.
- Click on the link to the project you want to select.



General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS.PROJECT_GENERAL_GBL

PeopleSoft.

Home Worklist Add to Favorites Sign out

New Window Help

Project General Definition Manager Location Phases Approval Justification User Fields

Business Unit: 11000 Office of Management & Budget

*Project: 0000000000000000 Create New Project

*Description: Paging Add to My Projects

*Integration: 11000 OMB Integration

Project Type: 02 State Radio

Status: Active

My Projects

Project Summary

Project Team

Project Activities

Description End View All First 4 of 1 Last

Date/Time Stamp: 03/16/04 8:55:39AM

User ID: nkhaminejour

Description:

Long Descriptions:

Save Return to Search Next in List Previous in List Refresh Add Update Drop History Include History Connect History

Done

Start General Information - ... Projects Training Manual - ...

Internet 8:55 AM

- On the Project General page for the selected project, click the **Add to My Projects** button.
- You will get a message that the project was added to your list.
- Click "OK".

General Information - Microsoft Internet Explorer

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS.PROJECT_GENERAL.GBL

PeopleSoft.

Home | What's New | Add to Favorites | Sign out

New Window | Help

Project General | Definition | Manager | Location | Phases | Approval | Justification | User Fields

Business Unit: 11000 Office of Management & Budget

*Project: 0000000000000000 Create New Project

*Description: Paging Add to My Projects My Projects

*Integration: 11000 OMB Integrat

Project Type: 02 State Radio

Status: Active

Description

Date/Time Stamp: 03/16/04 8:55:39AM

User ID: nkhamelgur

Description:

Long Description:

Save Return to Search Next in List Previous in List Refresh Add Update Display Include History Correct History

Done

Start | General Information - ... | Projects Training Manual - ... | 8:56 AM

- Now check your “My Projects” page by clicking on [My Projects](#) hyperlink in the box to the right. You will see that the selected Project is now available on your list.

General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf041/EMPLOYEE/EMP/q/CREATE_PROJECTS.PROJECT_GENERAL.GBL

PeopleSoft.

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#)

My Projects

User ID: nkhamnelpur
Name: Natgol Khamnelpur

[Edit My Projects](#) | [Preferences](#)

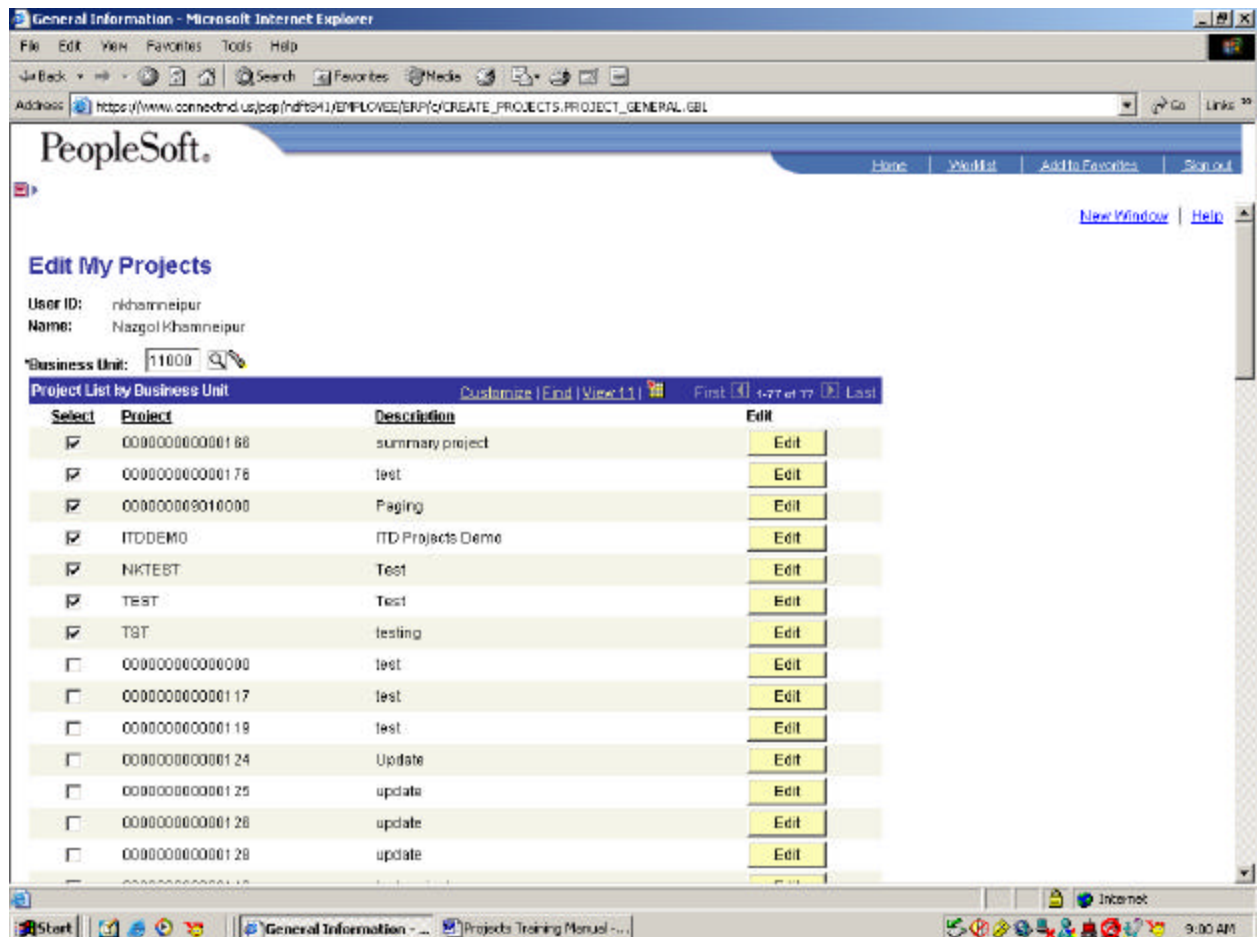
Unit	Project ID	Description	Status	Name	% Complete	Edit
11000	000000000000186	summary project				Edit
11000	000000000000178	test				Edit
11000	0000000000001000	Paging				Edit
11000	ITD.DEMO	ITD Projects Demo				Edit
11000	NKTEST	Test	Open			Edit
11000	TEST	Test				Edit
11000	TST	testing				Edit
72000	000000000000121	Project				Edit
72000	101	Department Accounting		Mattison, Bradley J		Edit
80100	NKTEST	Test				Edit
80100	VORGROUP1	Vehicle Group 01				Edit
80100	VORGROUP4	Vehicle Group 04				Edit

[Create New Project](#)

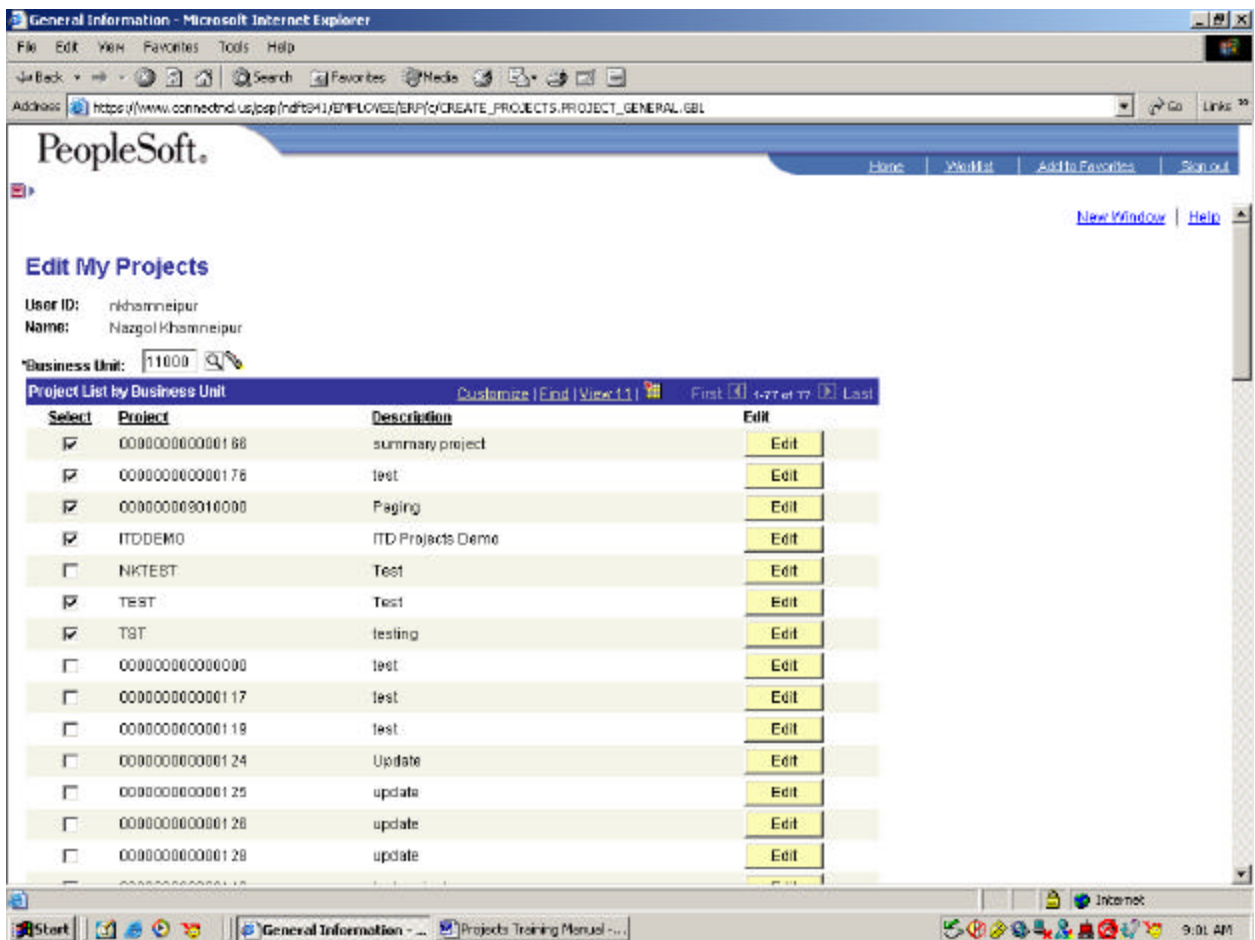
Start | General Information - ... | Projects Training Manual - ... | 9:58 AM

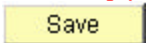
Removing / Adding a Project from “My Projects” Page

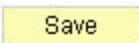

- To remove a project from “My Projects,” click on [Edit My Projects](#) hyperlink. This will take you to a list of projects, with your selected projects at the top.



- To take a project off of your ‘My Projects’ list, uncheck the little box to the left of the Project.



Note: Optionally, you can use this page to add additional Project Ids to your My Projects list. Simply navigate to the Edit My Projects page, check the checkbox next to the selected Project. Then click the  button.

- Click the  button on the bottom left side of the page.
- Once you click the  button you will be returned to My Projects page automatically. The projects you unchecked will be gone from your list.
- Consequently click the Return to [My Projects](#) hyperlink to return to the My Projects page if you made no changes.

General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS.PROJECT_GENERAL.GBL

PeopleSoft®

Home View Mail Add to Favorites Sign out

New Window Help

My Projects

User ID: nkhamneipur
Name: Nazgol Khamneipur

[Edit My Projects](#) • [Preferences](#)

Unit	Project ID	Description	Status	Name	% Complete	Edit
11000	000000000000166	summary project				Edit
11000	000000000000178	test				Edit
11000	0000000000001000	Paging				Edit
11000	ITCDEM0	ITD Projects Demo				Edit
11000	TEST	Test				Edit
11000	TBT	testing				Edit
72000	000000000000121	Project				Edit
72000	101	Department Accounting		Mattison, Bradley J		Edit
80100	NBKTEST	Test				Edit
80100	VORGROUP1	Vehicle Group 01				Edit
80100	VORGROUP4	Vehicle Group 04				Edit

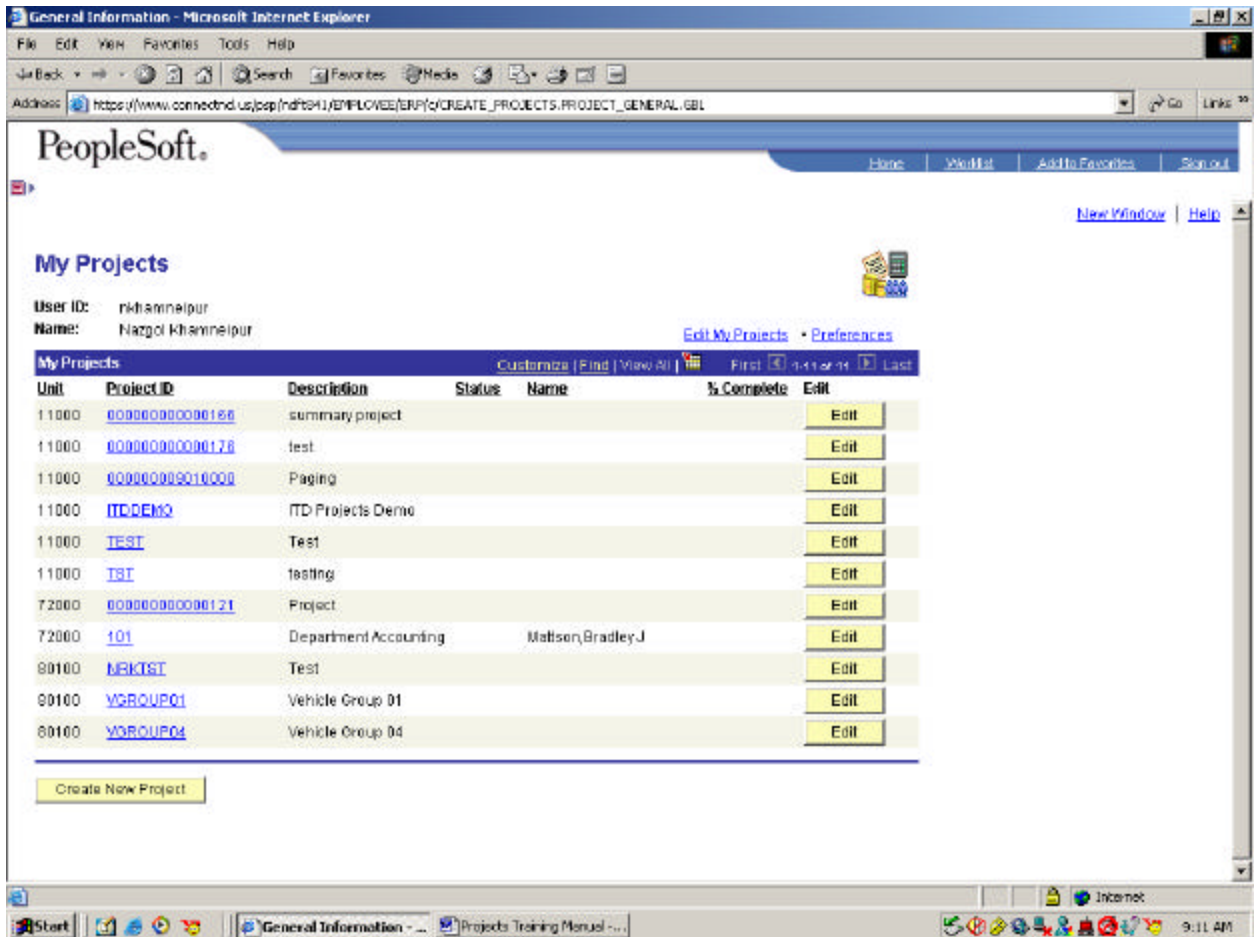
[Create New Project](#)

Start | General Information - ... | Projects Training Manual - Microsoft Word | Projects Training Manual - ... | 9:04 AM

Note: I unchecked Project ID NKTEST on the previous Edit My Projects page and therefore it is not available on this list.

Accessing Projects Through My Projects

- From My Projects, you can access a project in two ways.



General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/psp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS.PROJECT_GENERAL.GBL

PeopleSoft®

Home View Mail Add to Favorites Sign out

New Window Help

My Projects

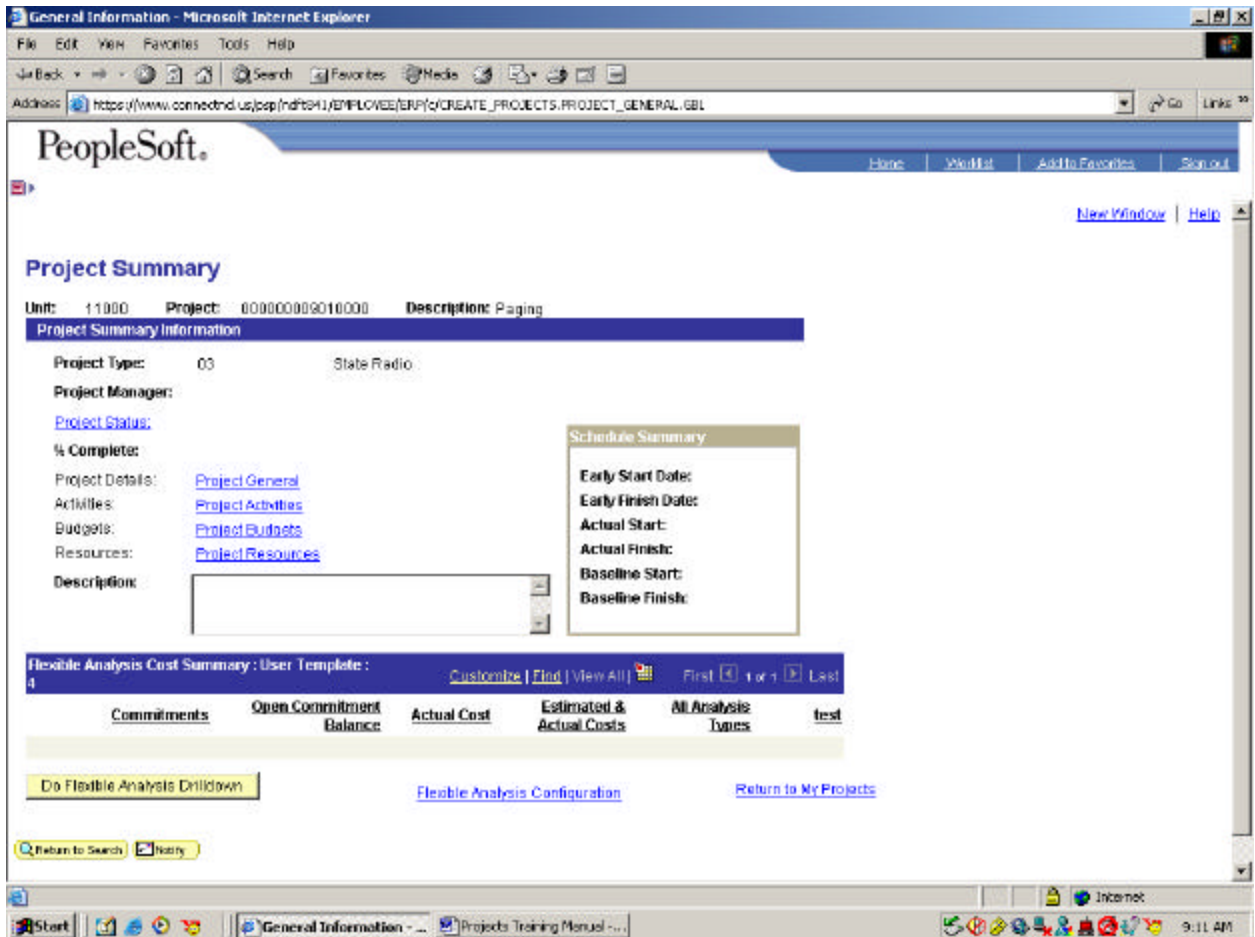
User ID: nkhamnelpur
Name: Nazgol Khamnelpur

[Edit My Projects](#) • [Preferences](#)

Unit	Project ID	Description	Status	Name	% Complete	Edit
11000	00000000000166	summary project				Edit
11000	00000000000178	test				Edit
11000	000000000001000	Paging				Edit
11000	ITDEMO	ITD Projects Demo				Edit
11000	TEST	Test				Edit
11000	TBT	testing				Edit
72000	00000000000121	Project				Edit
72000	101	Department Accounting		Mattison, Bradley J		Edit
00100	MRKIST	Test				Edit
00100	VGROUP01	Vehicle Group 01				Edit
00100	VGROUP04	Vehicle Group 04				Edit

[Create New Project](#)

- Clicking on the [Project ID](#) hyperlink will take you to the Project Summary page.



- Click on the [Edit](#) button to the right of the project, and go directly to the Project General page.

General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf041/EMPLOYEE/EMP/q/CREATE_PROJECTS.PROJECT_GENERAL.GBL

PeopleSoft.

Home Worklist Add to Favorites Sign out

New Window Help

Project General Definition Manager Location Phases Approval Justification User Fields

Business Unit: 11000 Office of Management & Budget

*Project: 000000009010000 Create New Project

*Description: Paging Add to My Projects

*Integration: 11000 OMB Integration

Project Type: 03 State Radio

Status: Active

My Projects
Project Summary
Project Team
Project Activities

Description Find | View All First [4] of 1 [9] Last

Date/Time Stamp: 03/16/04 9:11:27AM

User ID: nkhamneipar

Description:

Long Descriptions:

Return to My Projects

Save Return to Search Refresh Add Cancel Cancel Cancel Include History Correct History

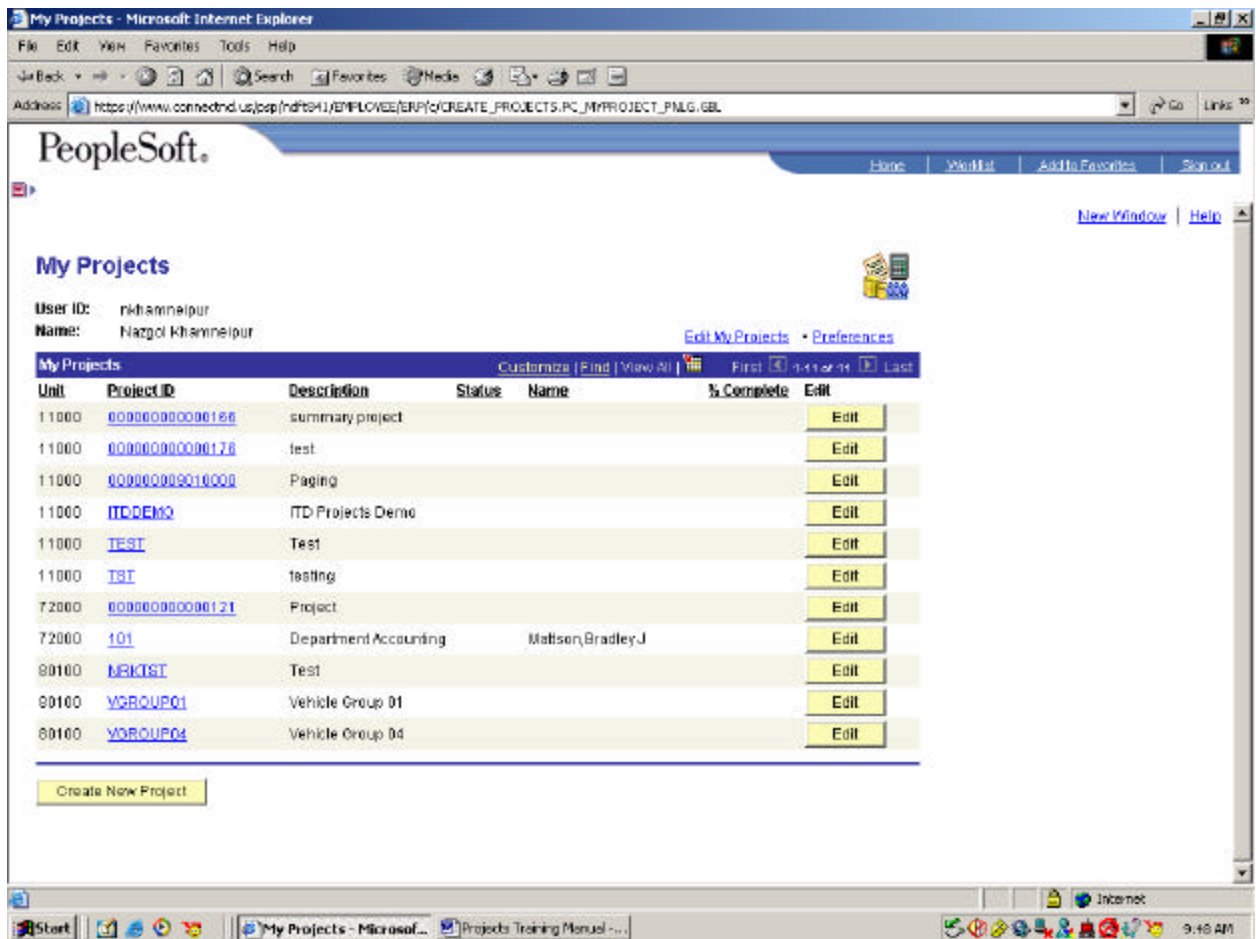
Done

Start General Information - ... Projects Training Manual - ...

Internet 9:11 AM

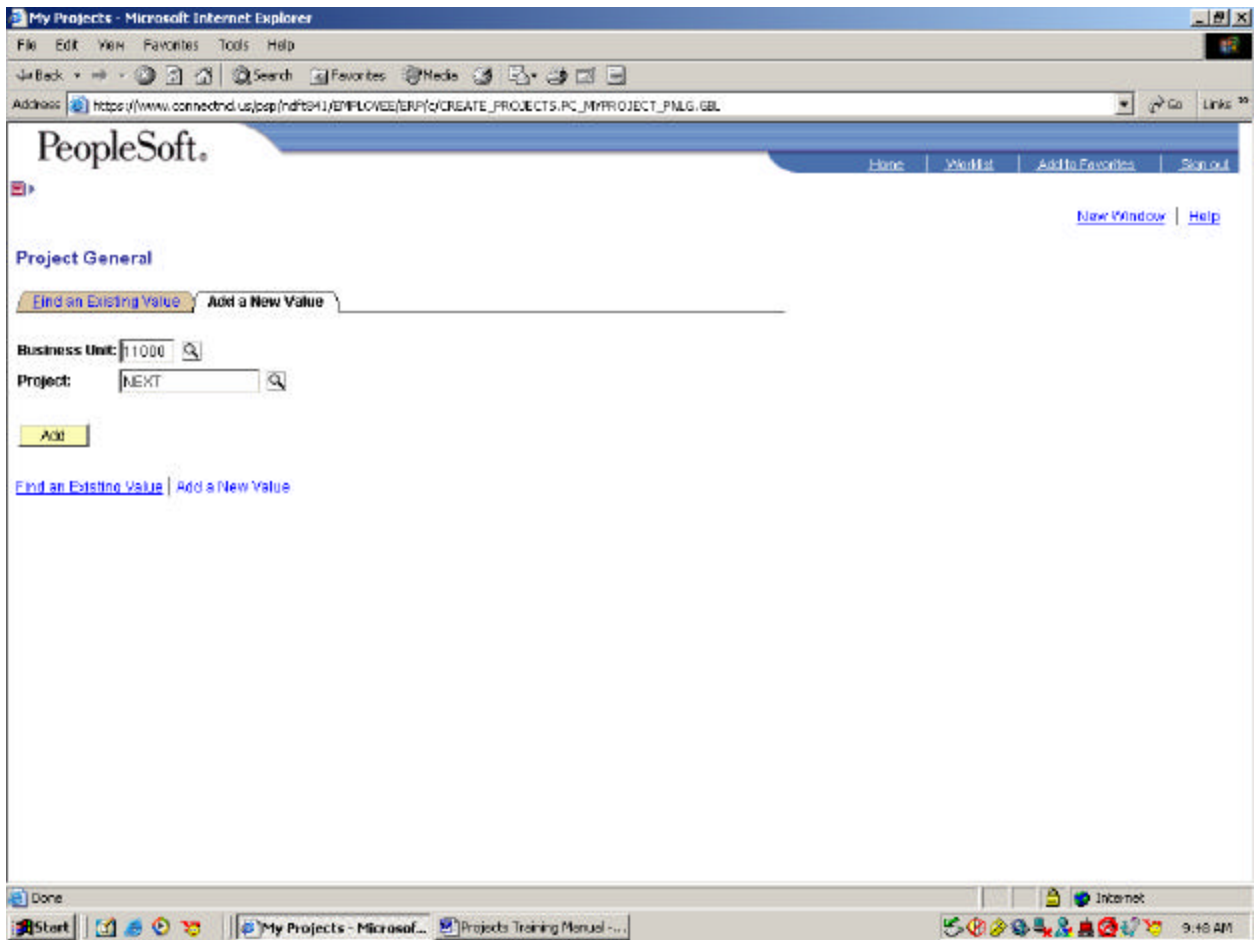
Creating Projects Through My Projects

- From My Projects you can create new projects and add them to your personalized project list.



- Click **Create New Project** to add a new Project. You will be navigated to the Project General page.

Alternate navigation to add a new Project is: Project > Project > General Information.



My Projects - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print Mail

Address: https://www.connectnd.us/bep/ndf0041/EMPLOYEE/EMP/q/CREATE_PROJECTS.PC_MYPROJECT_PNLG.GBL

Go Links

PeopleSoft.

Home Worldat Add to Favorites Sign out

New Window Help

Project General

Find an Existing Value Add a New Value

Business Unit: 11000

Project: NEXT

Add



Find an Existing Value Add a New Value

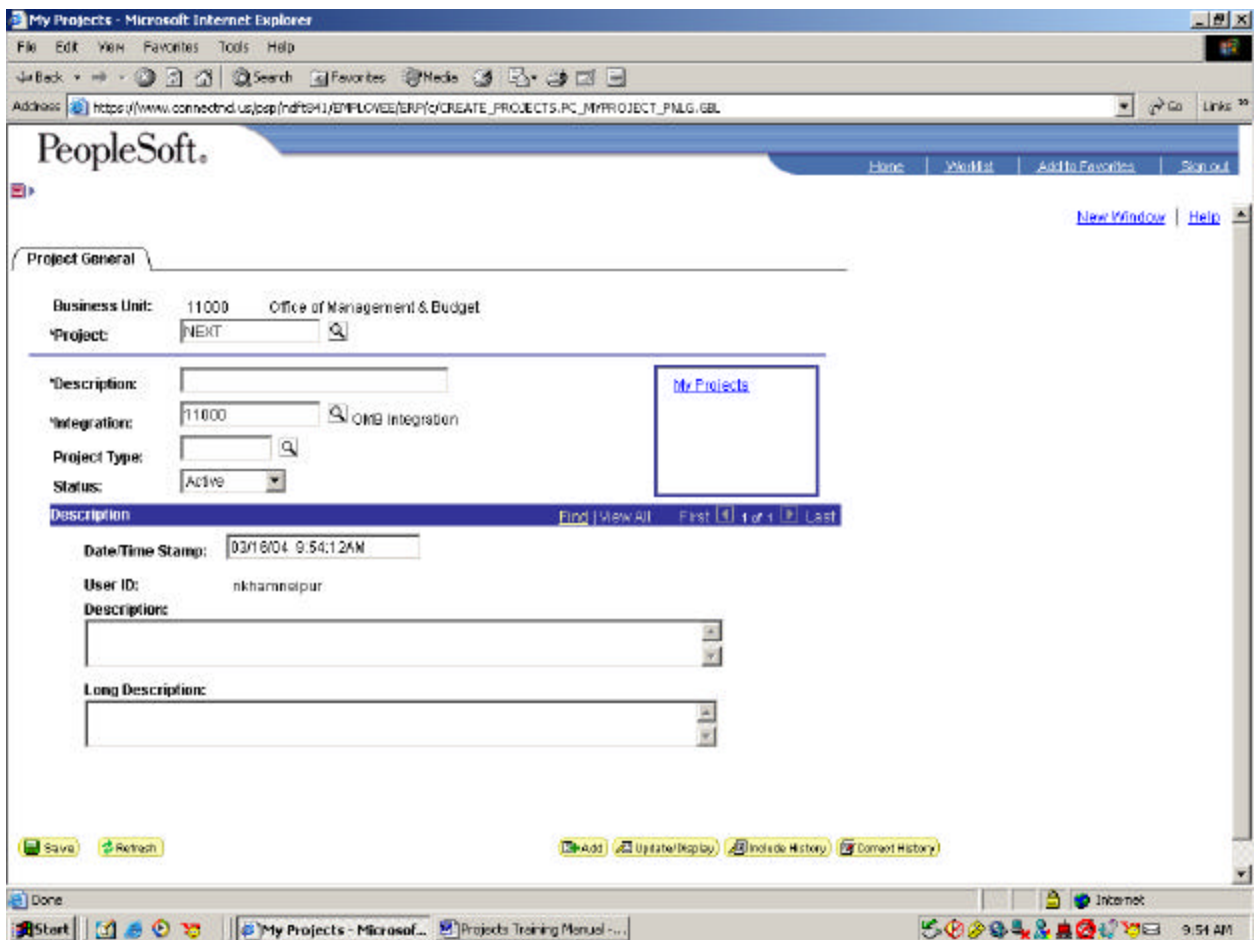
Done

Start My Projects - Microsof... Projects Training Manual - ...

Internet

9:46 AM

- Business Unit: Projects Business Unit. Click on the magnifying glass icon  to select from valid values.
- Project: Either leave the Project ID to NEXT to allow for auto numbering, or enter a unique Project Id. Project Ids must be unique across all Business Units.
- Click .



My Projects - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS_PC_MYPROJECT_PNLG.GBL

PeopleSoft.

Home What's New Add to Favorites Sign out

New Window Help

Project General

Business Unit: 11000 Office of Management & Budget

Project: NEXT

Description:

Integration: 11000 QMB Integration

Project Type:

Status: Active

My Projects

Description Find View All First 1 of 1 Last

Date/Time Stamp: 03/16/04 9:54:12AM

User ID: nkhamnispur



Descriptions:

Long Description:

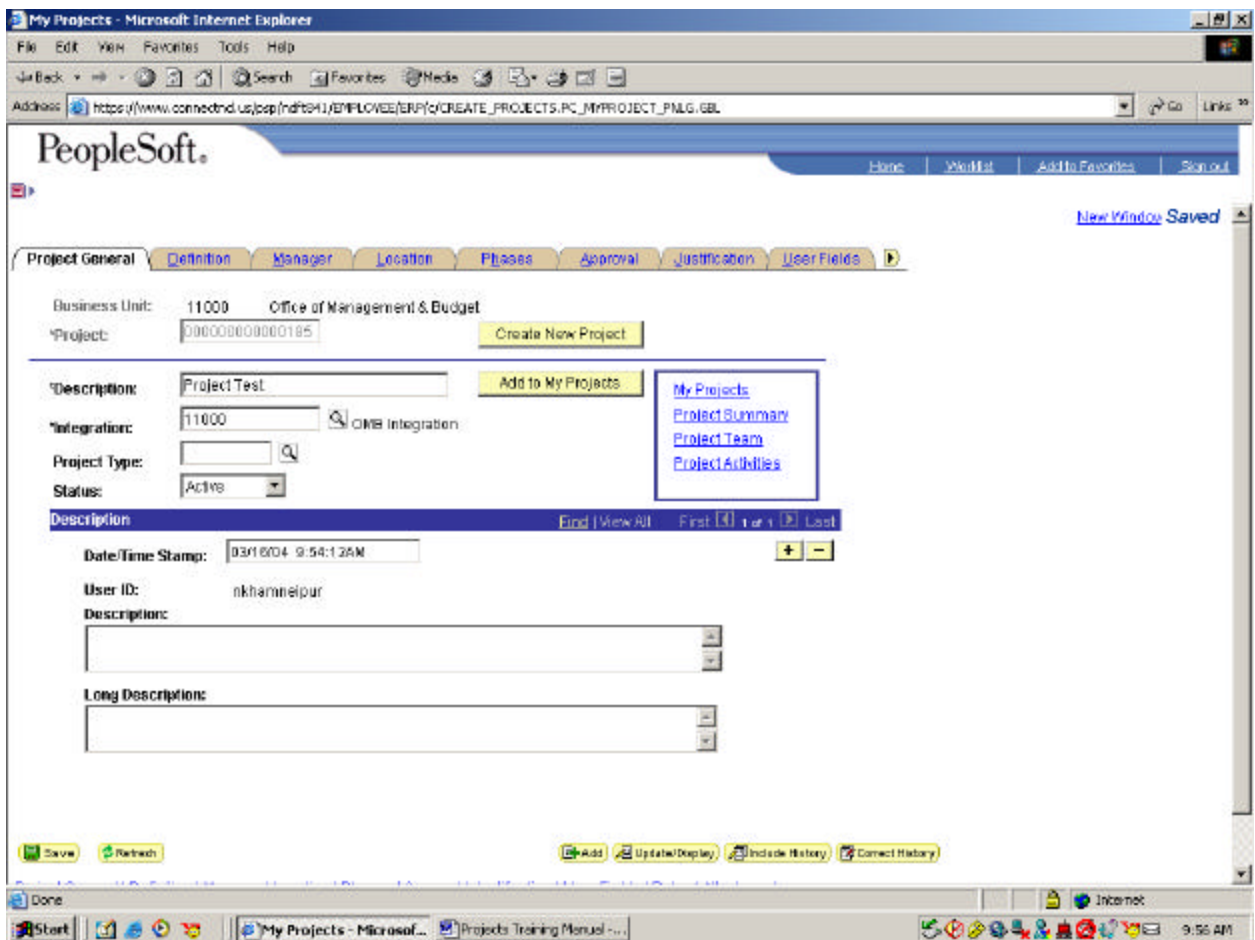
Save Refresh Add Update/Display Include History Connect History

Done

Start My Projects - Microsof... Projects Training Manual ... 9:54 AM

- Description: Enter an appropriate description for the new Project.
- Integration: Enter the appropriate Integration for the Projects Business Unit.
- Project Type: Enter the Project Type, if appropriate. Click on the magnifying glass icon  to select from valid values.
- Click .

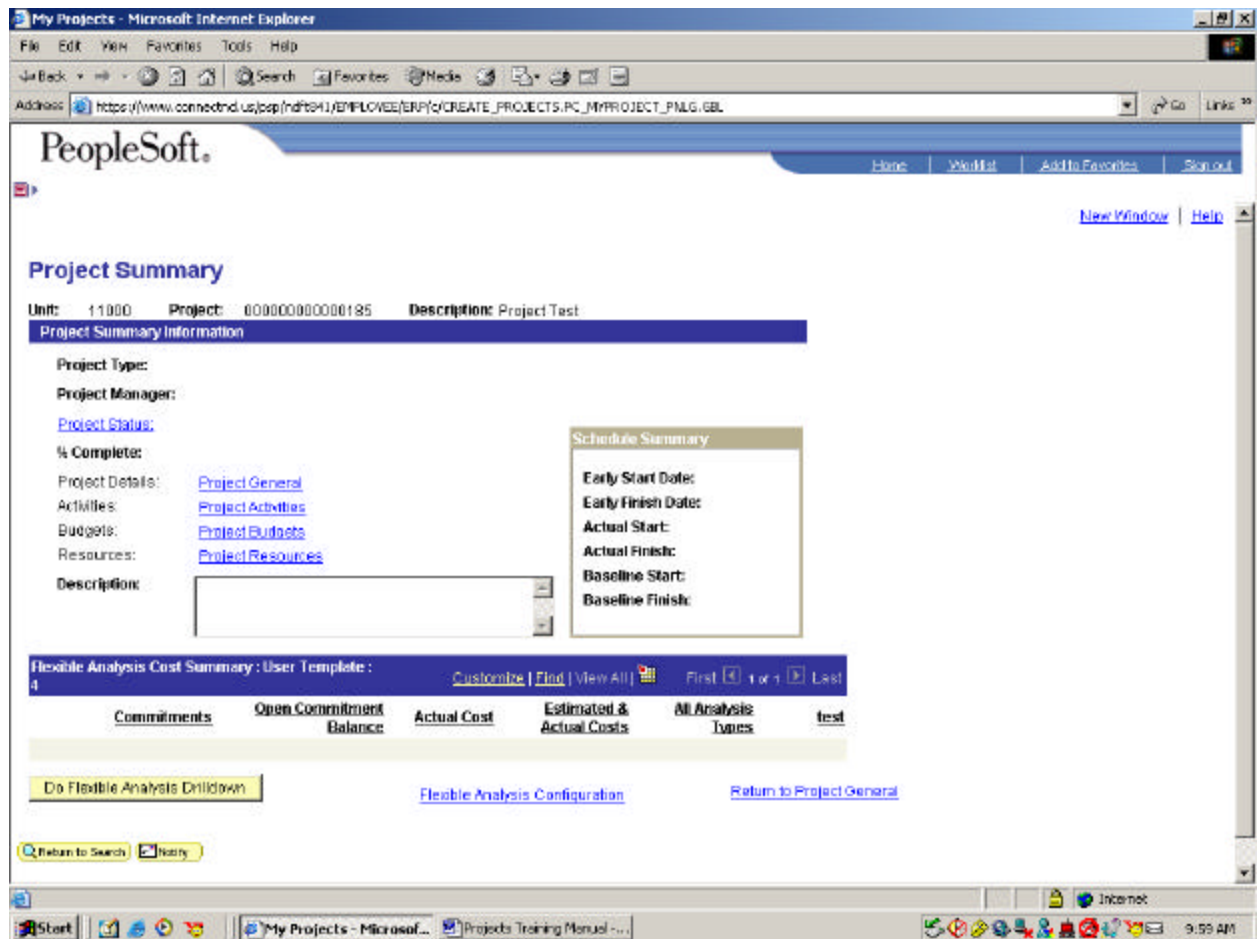
Note: Once saved the Project field changed from "NEXT" to an auto-sequenced Project ID. Also additional Project pages are available once saved.



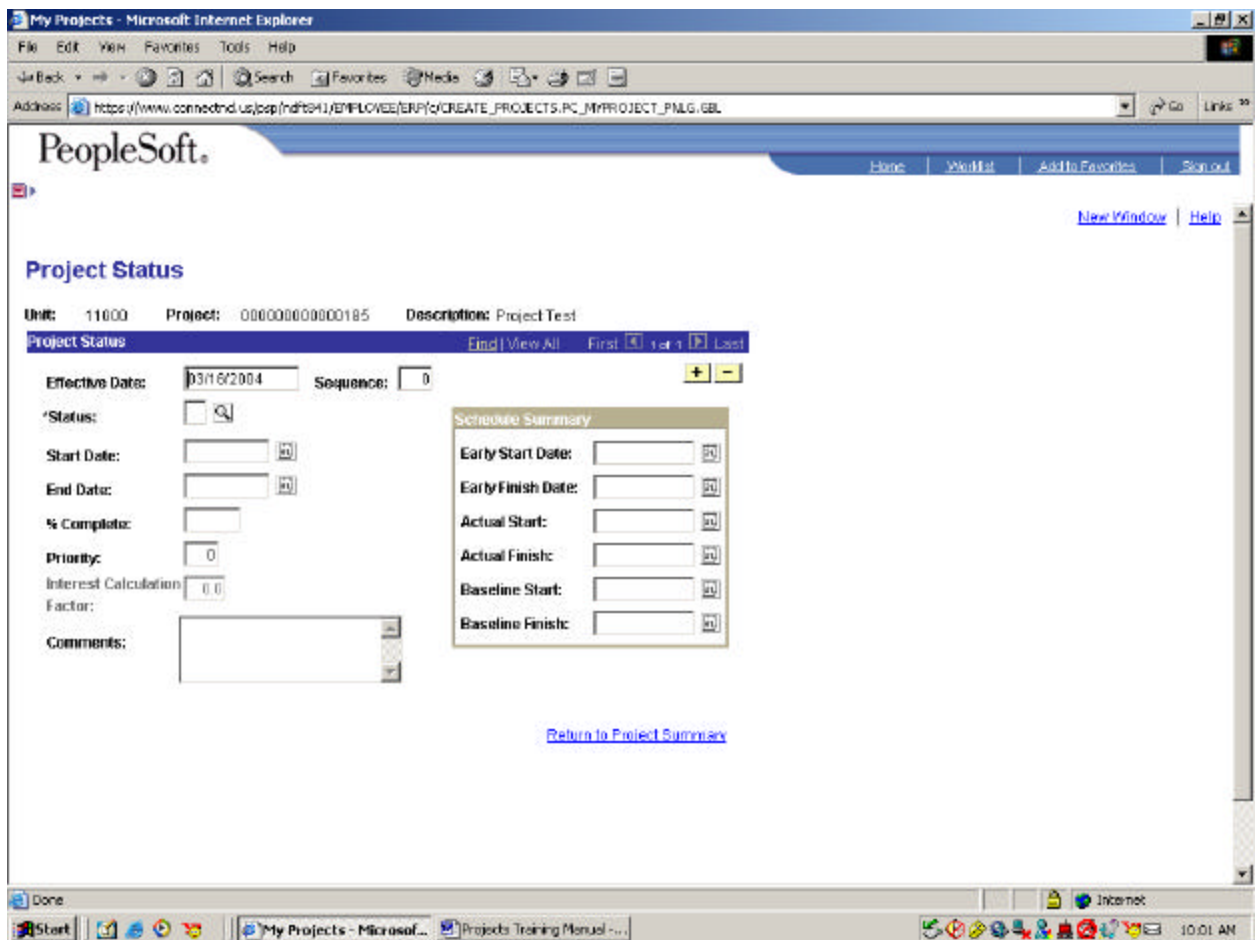
- Click the **Add to My Projects** to add this new Project to your personalized Project list.
- Click **Create New Project** to create a new Project.

Accessing Project Summary From My Projects

- From the Project Summary page, you can use hyperlinks to several other pages.



- [Project Status](#): Use the Project Status page to maintain status information.



- Click on the [Return to Project Summary](#) hyperlink to return to the Project Summary page.
- [Project General](#): From the Project General page, you can choose from several different tabs. The use of the tabs is described below. If you cannot see the tabs on your screen, click the arrow button to the left or right of the tabs to display the additional tabs.

My Projects - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/cr/CREATE_PROJECTS.PC_MYPROJECT_PNLG.GBL

PeopleSoft.

Home View Mail Add to Favorites Sign out

New Window Help

Project General Definition Manager Location Phases Approval Justification User Fields

Business Unit: 11000 Office of Management & Budget

Project: 000000000000185 Create New Project

Description: Project Test Add to My Projects

Integration: 11000 OMB Integration

Project Type:

Status: Active

My Projects
Project Summary
Project Team
Project Activities

Description End View All First 4 of 2 Last

Date/Time Stamp: 03/16/04 10:01:57AM

User ID: nkhamineipur

Description:

Long Description:

Return to Project Summary

Save Return to Search Refresh Add Update/Cancel Include History Correct History

Done

Start My Projects - Microsof... Projects Training Manual...

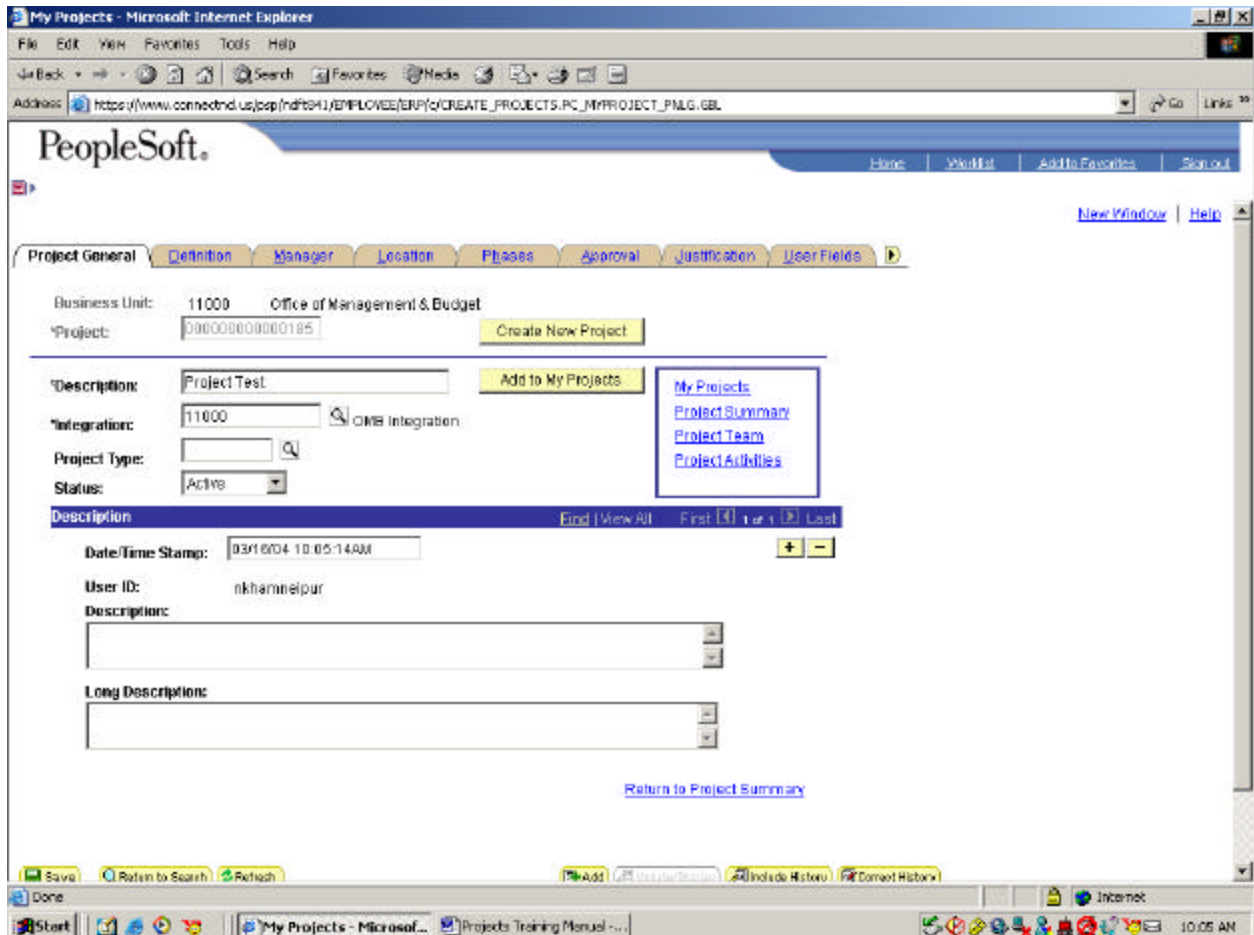
Internet 10:02 AM

- Click on the [Return to Project Summary](#) hyperlink to return to the Project Summary page.

Creating Projects

Project General

- From the Project General page, you can choose from several different tabs. The use of the tabs is described below.
- If you cannot see the tabs on your screen, click the arrow button to the left or right of the tabs to display the additional tabs.



My Projects - Microsoft Internet Explorer

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS.PC_MYPROJECT_PNL.GBL

PeopleSoft

Home | What's New | Add to Favorites | Sign out

[New Window](#) | [Help](#)

Project General | Definition | Manager | Location | Phases | Approval | Justification | User Fields

Business Unit: 11000 Office of Management & Budget

*Project: 000000000000185 [Create New Project](#)

*Description: Project Test [Add to My Projects](#)

*Integration: 11000 [OMB Integration](#)

Project Type: [Project Type](#)

Status: Active

[My Projects](#)
[Project Summary](#)
[Project Team](#)
[Project Activities](#)

Description [End | View All](#) [First](#) [4](#) [Next](#) [Last](#)

Date/Time Stamp: 03/16/04 10:05:14 AM

User ID: nkhammeipur

Description:

Long Description:


[Return to Project Summary](#)

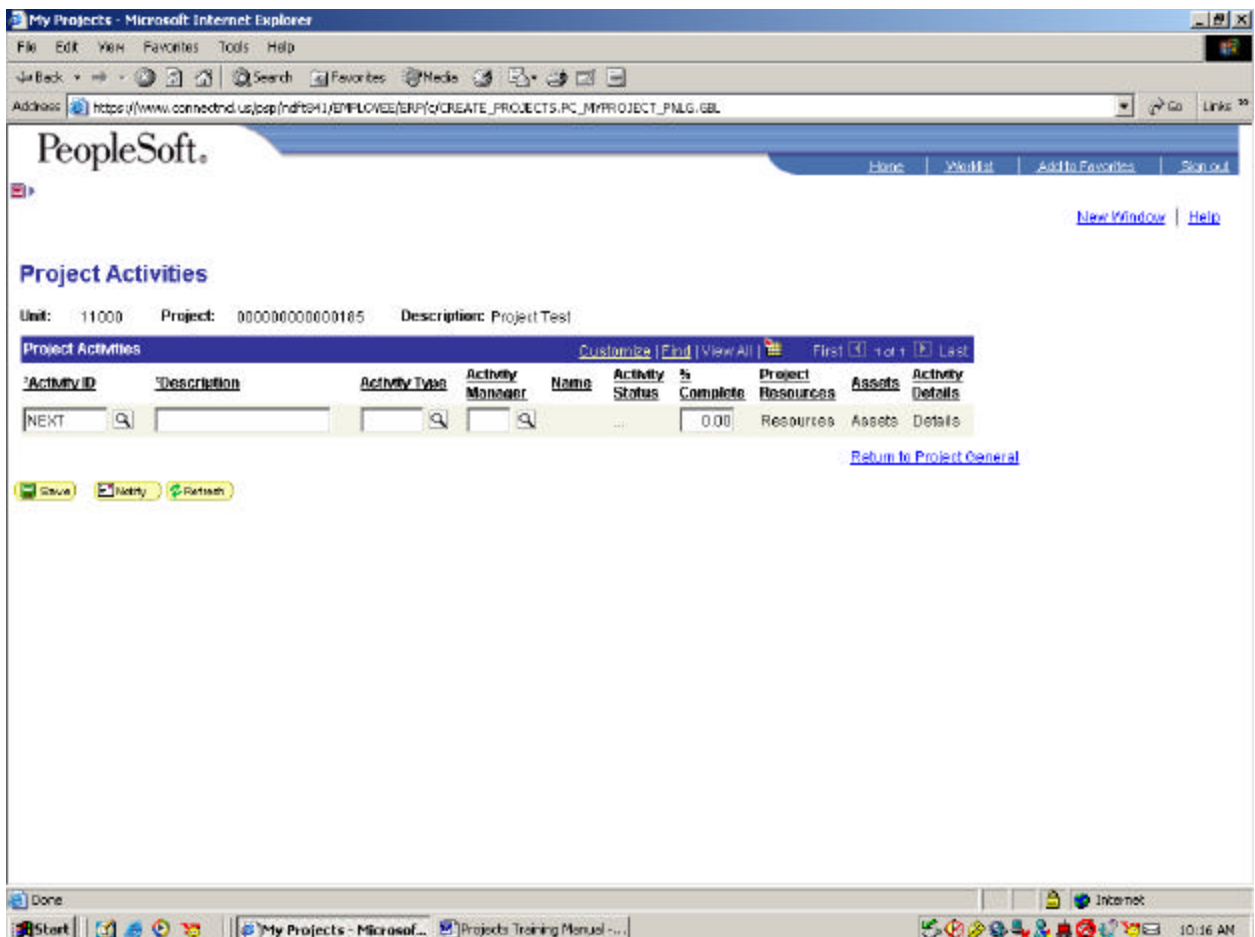
[Save](#) [Return to Search](#) [Refresh](#) [Add](#) [Update Status](#) [Include in History](#) [Correct History](#)

Done

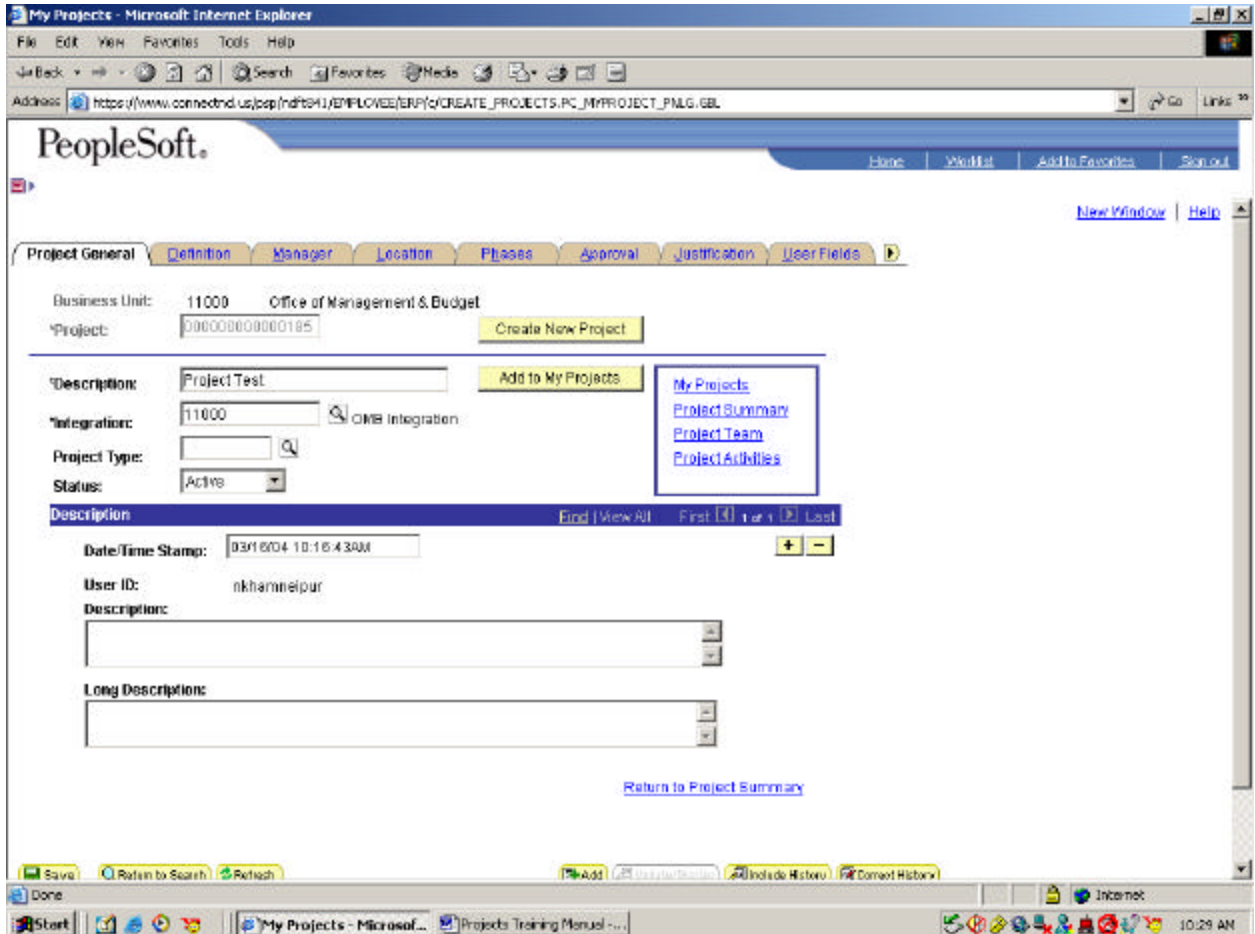
Start | My Projects - Microsoft... | Projects Training Manual... | 10:05 AM

Note: The status of a project defaults to 'Active'. Change the status to Inactive when you do NOT want any subsystems to be able to send incoming information to this particular Project.

- [My Projects](#): Click on the hyperlink to view your personalized list of projects and to access the My Projects page.
- [Project Summary](#): Click on the hyperlink to view the Project Summary page for this specific project.
- [Project Team](#): Used to set up a list of employees that work on this project.
- Use the add icon  to add as many team members as needed.
- The Team Detail page allows you to document team member names, roles, and dates on the project.
- [Project Activity](#): Click on the hyperlink to be access the Project Activities page where you can view, edit and add new activities for this project. You can also navigate to this page through the Project Summary as well as Project > Activities > General Information.

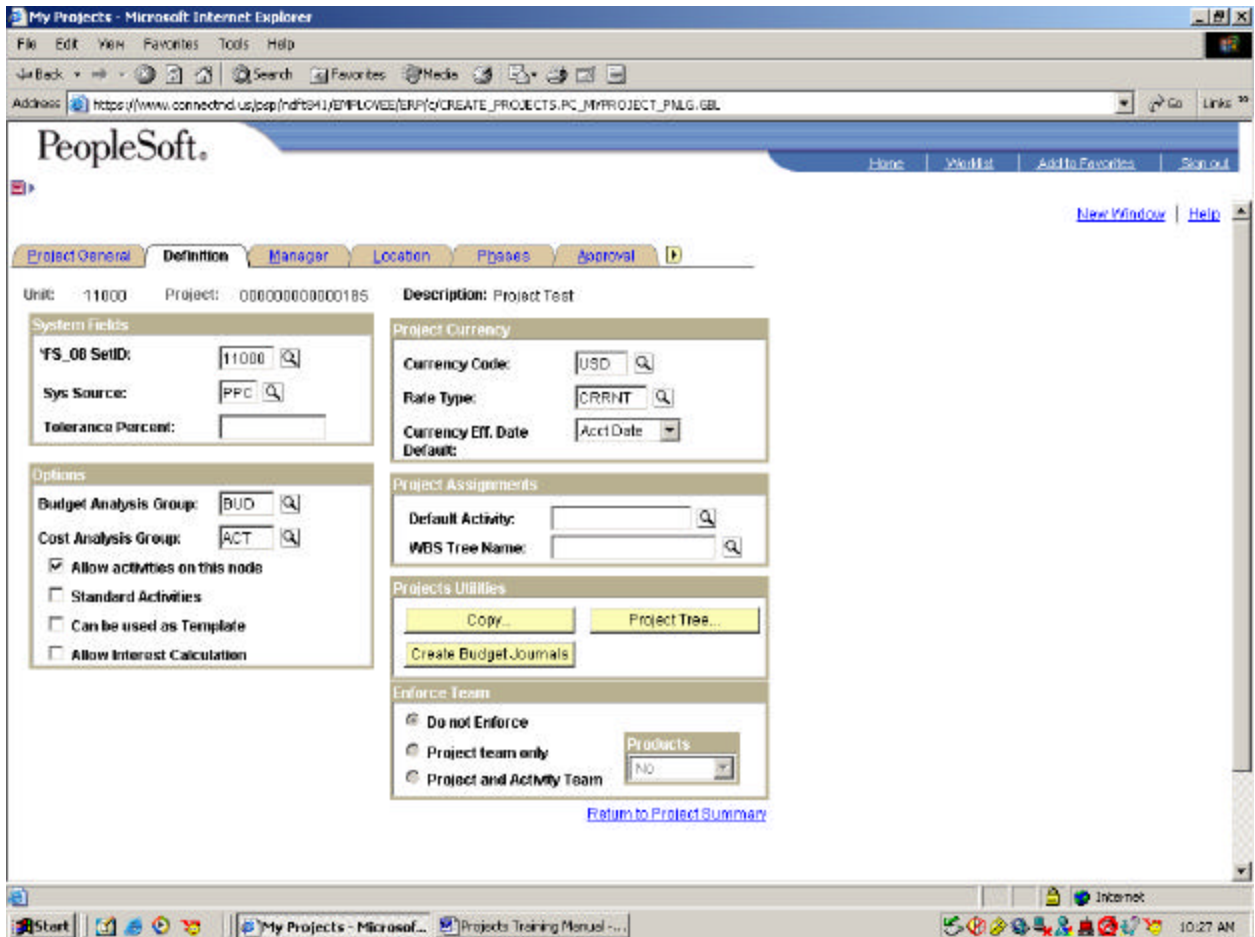


- Click on the Return to [Project General](#) hyperlink to return to the Project General page.



Project Definition tab

- The Definition page allows you to record the qualities of the project.



- Options:
 - Make sure that the 'Allow activities on this node' checkbox is checked unless this is a summary shell Project on Tree Hierarchy.
 - Can be Used as a Template: Project Templates are used for the Project Copy functionality. If you want to be able to copy this project, check this checkbox.
 - Standard Activities: By selecting the 'Standard Activities' check box, you will be able to add only standard activities to this project. Once you check this checkbox, your project will only be able to contain activities that are already setup as standard activities and that are tied to that Business Unit and specific Project Type.

Options

Budget Analysis Group:

Cost Analysis Group:

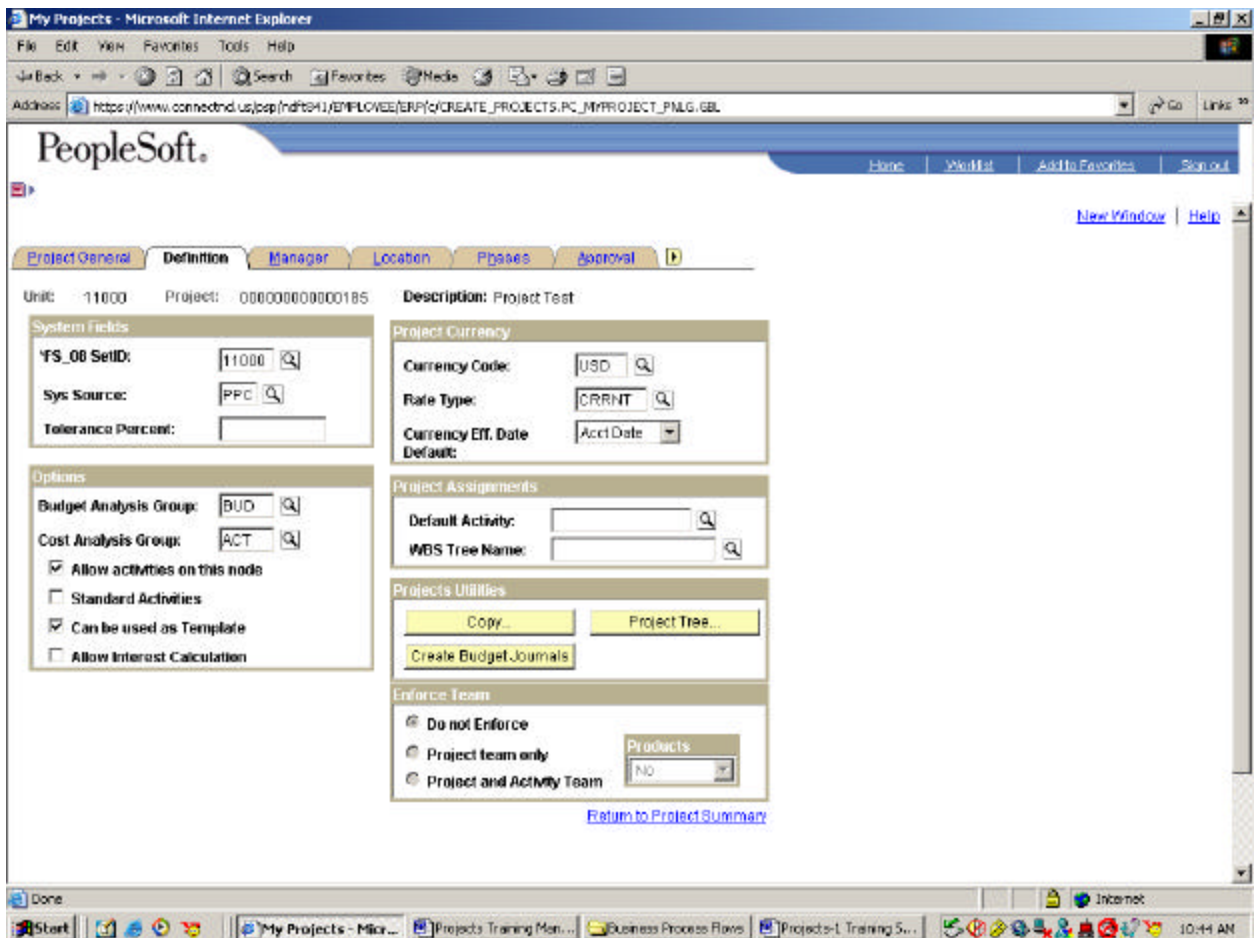
☒ **Allow activities on this node**

☐ **Standard Activities**

☐ **Can be used as Template**

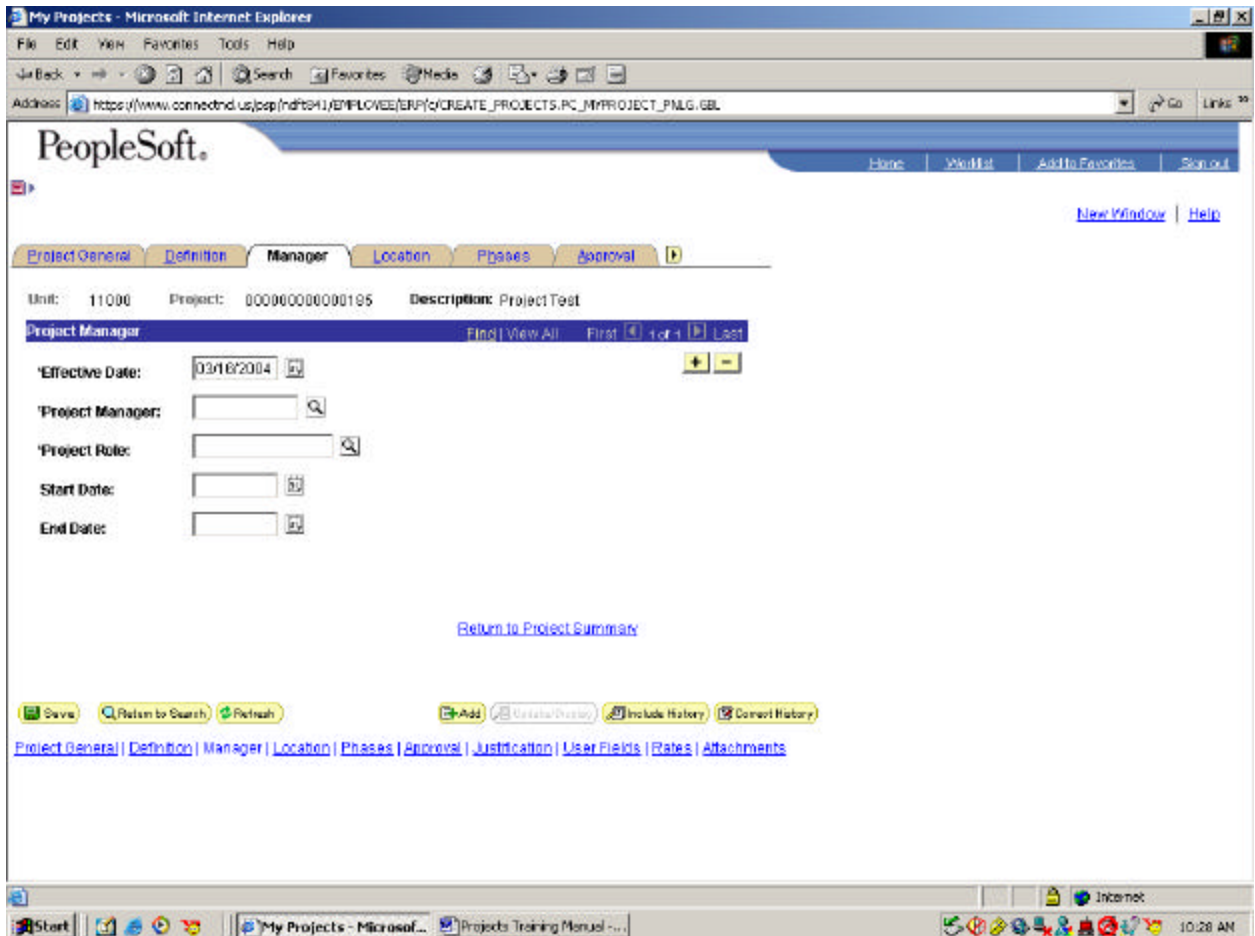
☐ **Allow Interest Calculation**

- Leave all other values on this page to remain as the default.



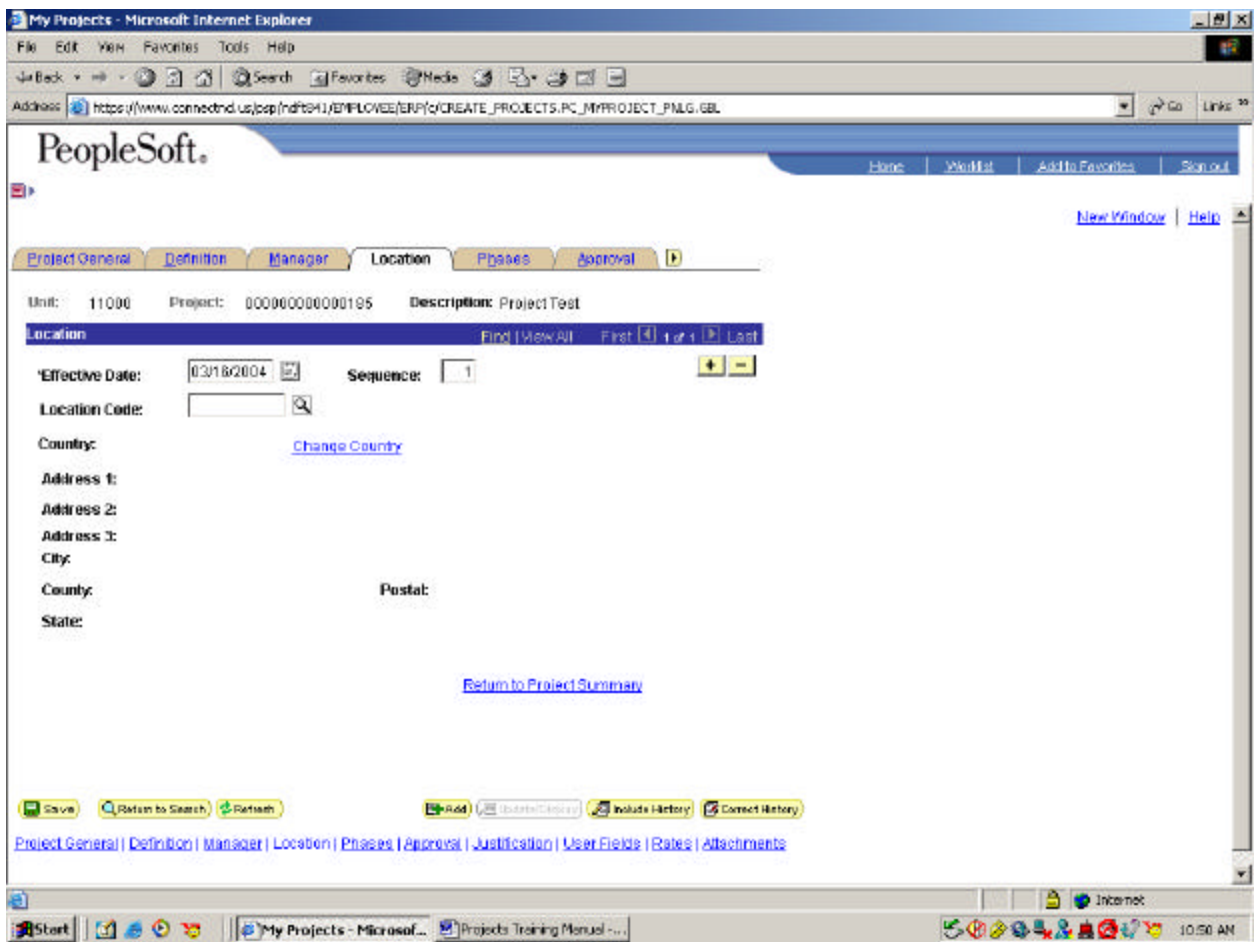
Manager Tab


- Optional.
- The Manager page allows you to record the Project Manager of the project as well as start and end dates. This page is effective dated to keep an audit trail of Project Managers assigned to the Project.



Location Tab

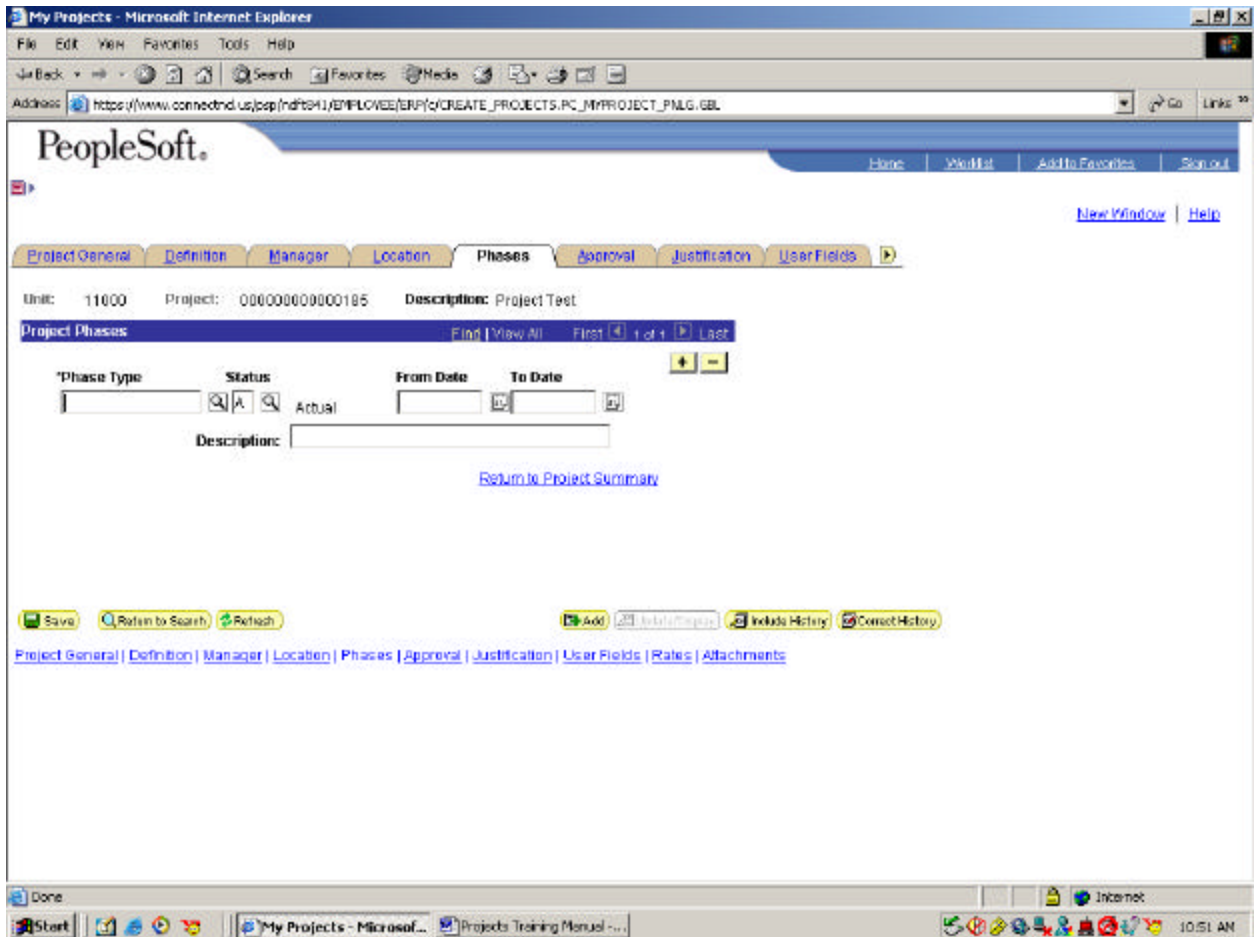
- Optional.
- The Location page allows you to record the location of the project and is used for reporting. Locations are not required. This page is effective dated to keep an audit trail as well as allow multiple locations.



- Location Code: Click on the magnifying glass icon  to see a list of valid values.

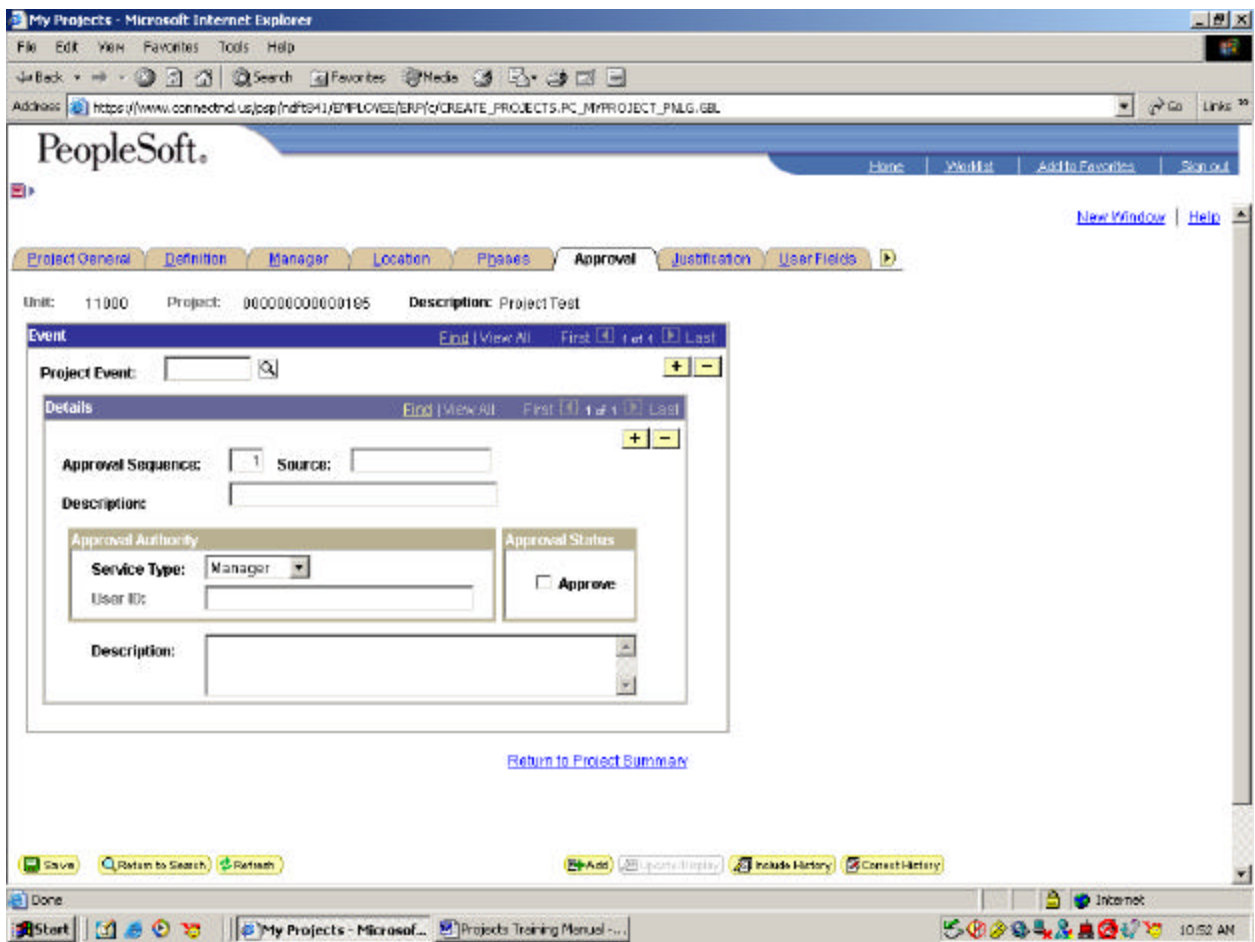
Phases Tab

- Optional.
- The Phases page allows you to create schedules for your projects based on phases and start / end dates. Phases are not required and must be updated manually in terms of phases and dates.



Approval Tab

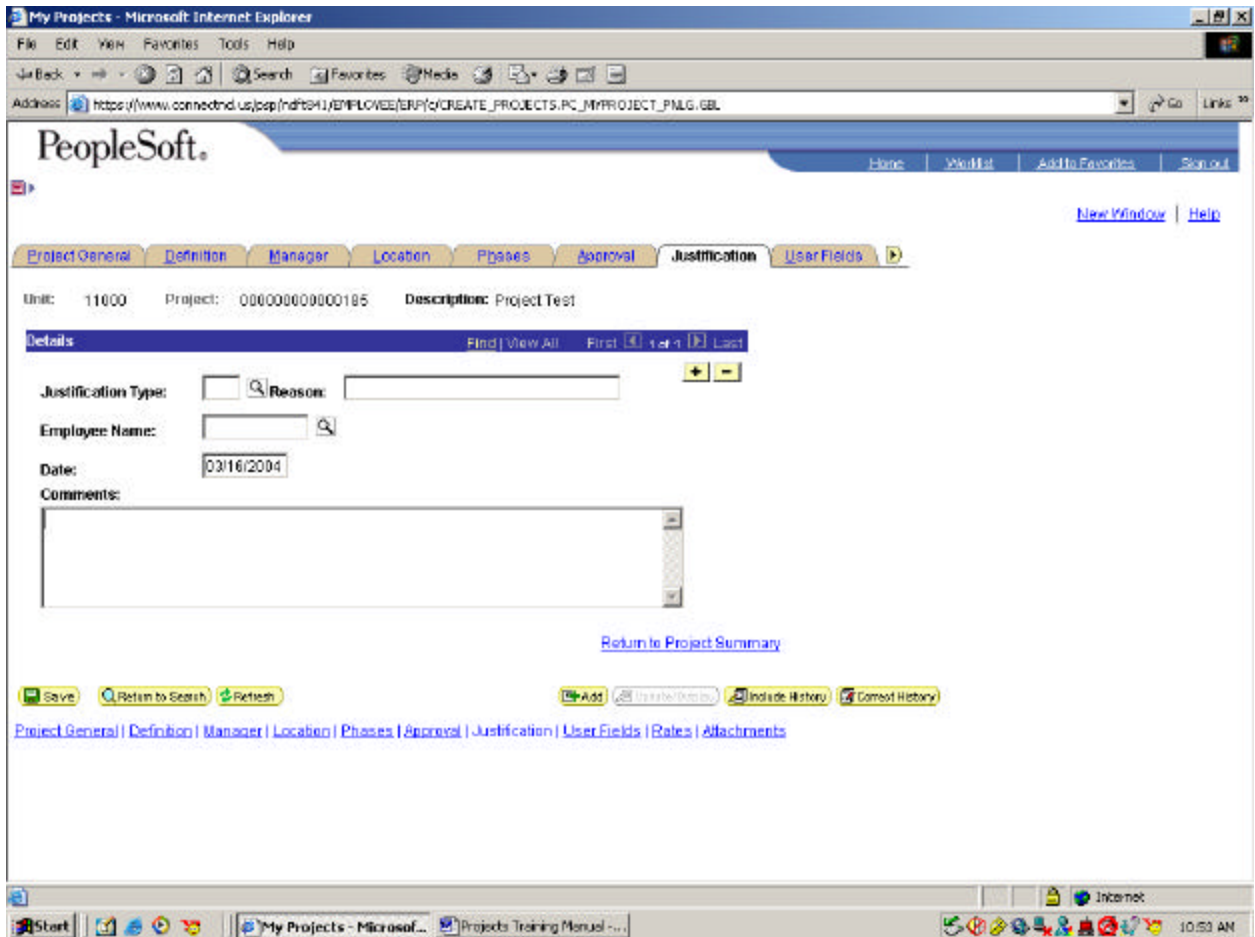
- Optional.
- The Approval page allows you to set up criteria necessary for approval steps as well as indicating that the approval has been received.



The screenshot shows a web browser window titled "My Projects - Microsoft Internet Explorer" displaying the PeopleSoft application. The address bar shows the URL: https://www.connectnd.us/bsp/ndf0041/EMPLOYEE/EMP/q/CREATE_PROJECTS.PC_MYPROJECT_PNLG.GBL. The PeopleSoft logo is at the top left, and navigation links (Home, Worklist, Add to Favorites, Sign out) are at the top right. Below the logo is a tabbed interface with tabs: Project General, Definition, Manager, Location, Phases, Approval, Justification (selected), and User Fields. The main content area shows project details for Unit: 11000, Project: 00000000000105, and Description: ProjectTest. The "Justification" tab is active, displaying a form with fields for Project Event, Approval Sequence (1), Source, Description, Approval Authority (Service Type: Manager, User ID), and Approval States (Approve checkbox). Navigation buttons like "End", "View All", "First", "Previous", "Next", and "Last" are present. At the bottom, there are buttons for Save, Return to Search, Refresh, Add, Update History, Include History, and Connect History. The Windows taskbar at the bottom shows the Start button, several application icons, and the system clock at 10:52 AM.

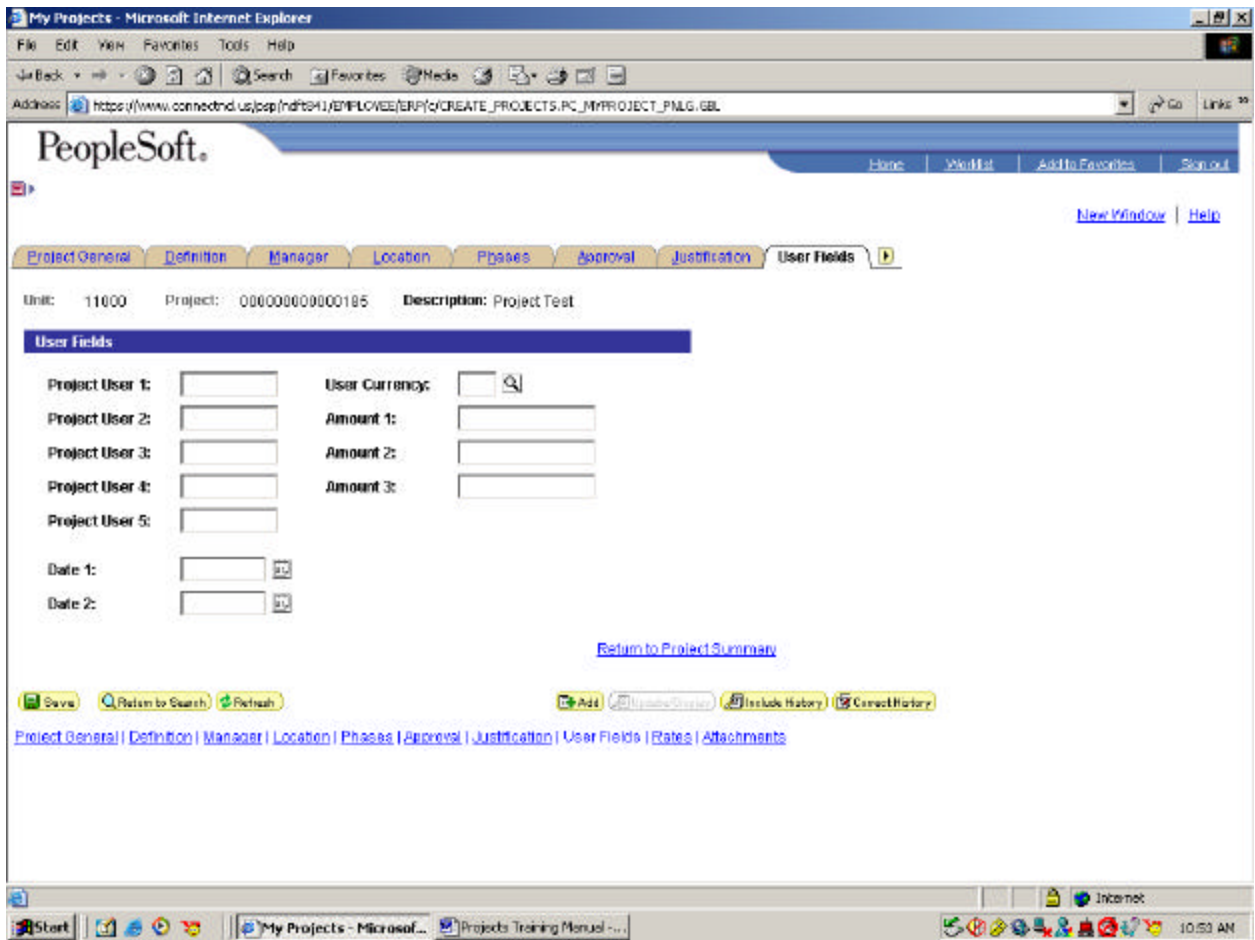
Justification Tab

- Optional.
- The Justification page allows you to set up justification types for your project.



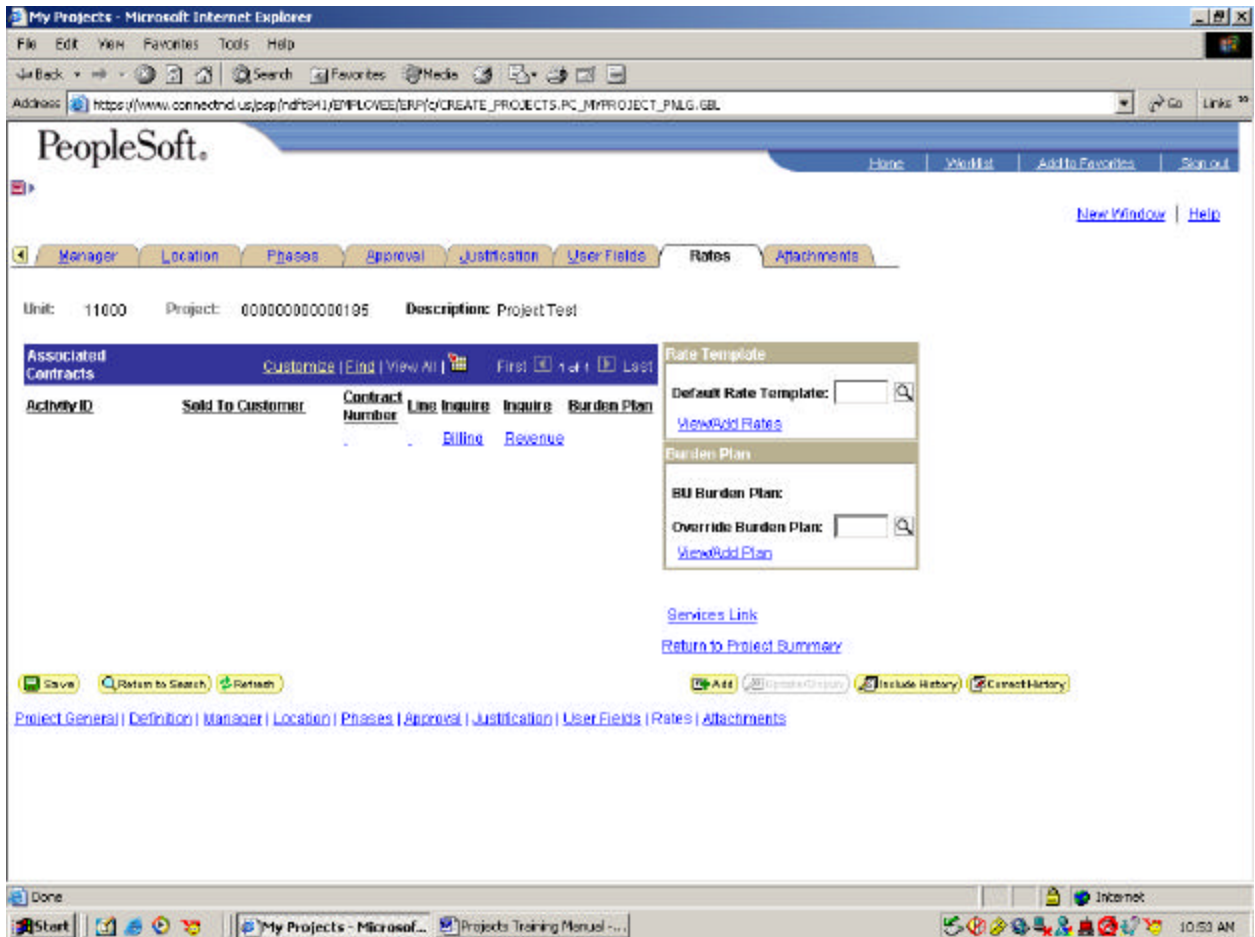
User Fields Tab

- Use is based on your Business Unit.
- The User Fields page allows you to assign your own custom values for your project.




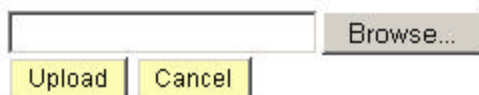
Rates Tab

- Optional.
- Assign a Default Rate Template to the Project. The Burden Plan (if any) will default from the Project Options, but can be overridden.



Attachments Tab

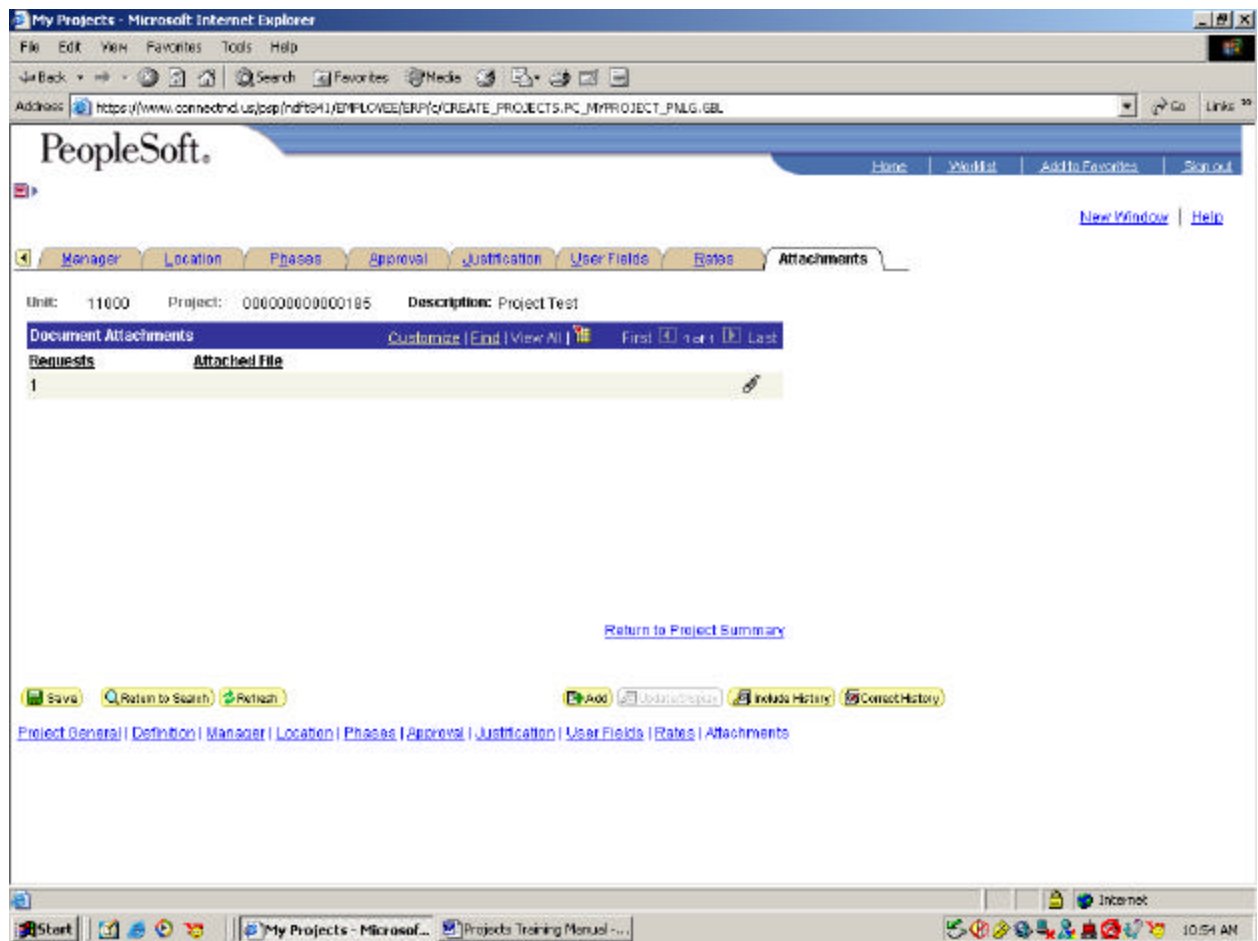
- The Attachments page can be used to link to files that provide information about the project. These can be any type of file (pictures, spreadsheets, text documents).
- Click on the paperclip icon  and then browse the network for the desired file, click on the file, and then click the "Upload" button.



- To attach more than one file, click the add icon  to get a new line with a paperclip icon .

- Once a file is attached, it can be deleted (by clicking on the trash can icon) or viewed (by clicking on the eyeglass icon).

Note: Attaching a file creates a copy of the file which is not connected to the original. Any changes made to the original file will not update the attachment, and deleting the original will not prevent the copy from being opened in PeopleSoft.



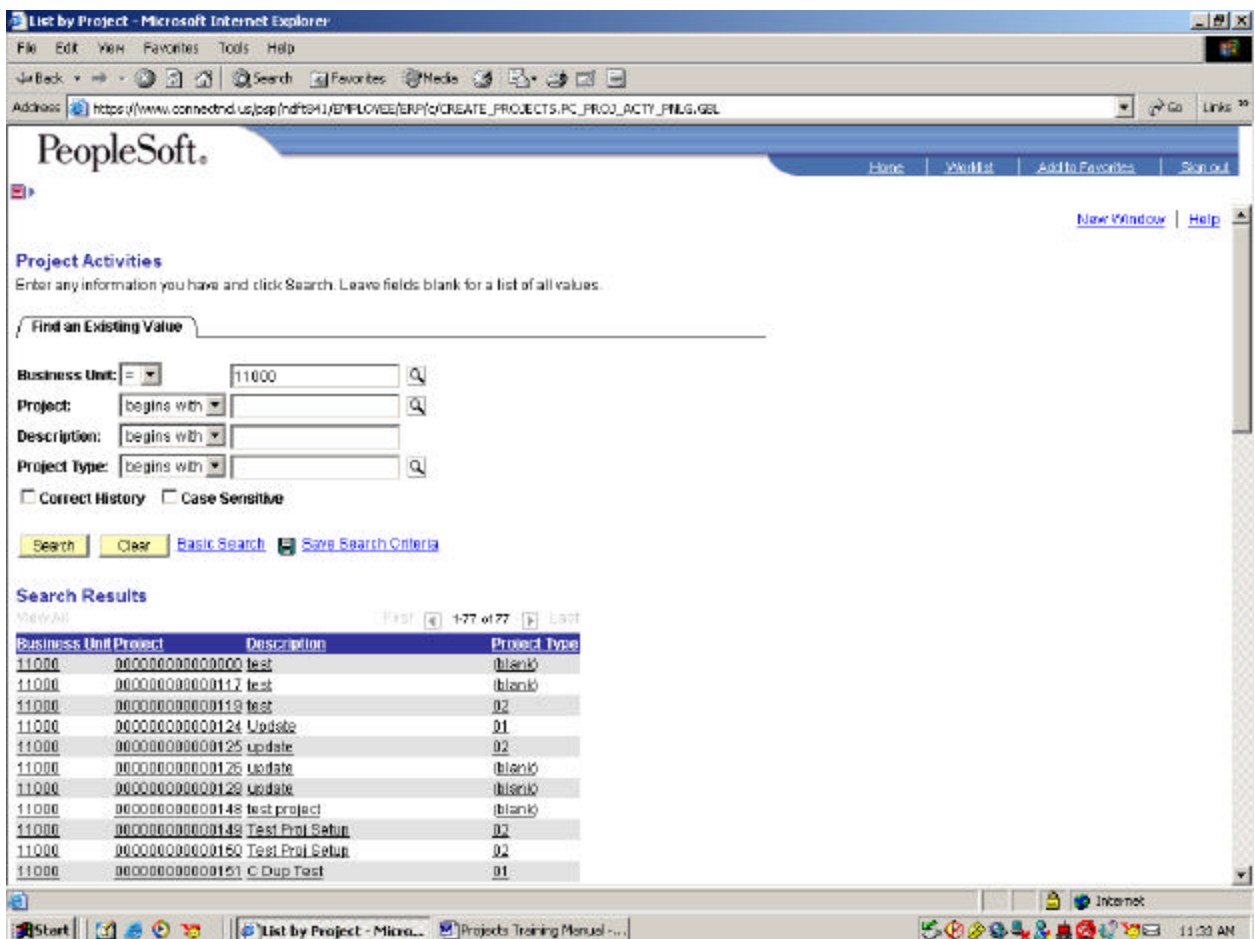
- Click .

Activities

- Activities are the individual tasks or events that make up a project.
- A project must have at least one activity in it, and can have as many activities as needed to segment the costs into useful reporting units.
- You can use the Projects menu to navigate directly to Activities, or you can navigate there from the Project General page > Project Activities List

Projects > Activities > List by Project

- The Project Activities page provides a list of all activities defined for the project and summary information for each activity. You may also add new activities using this page.



Project Activities
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value




Business Unit: [11000] [Q]
Project: [begins with] [Q]
Description: [begins with] [Q]
Project Type: [begins with] [Q]

☐ Correct History ☐ Case Sensitive

[Search] [Clear] [Basic Search] [Save Search Criteria]

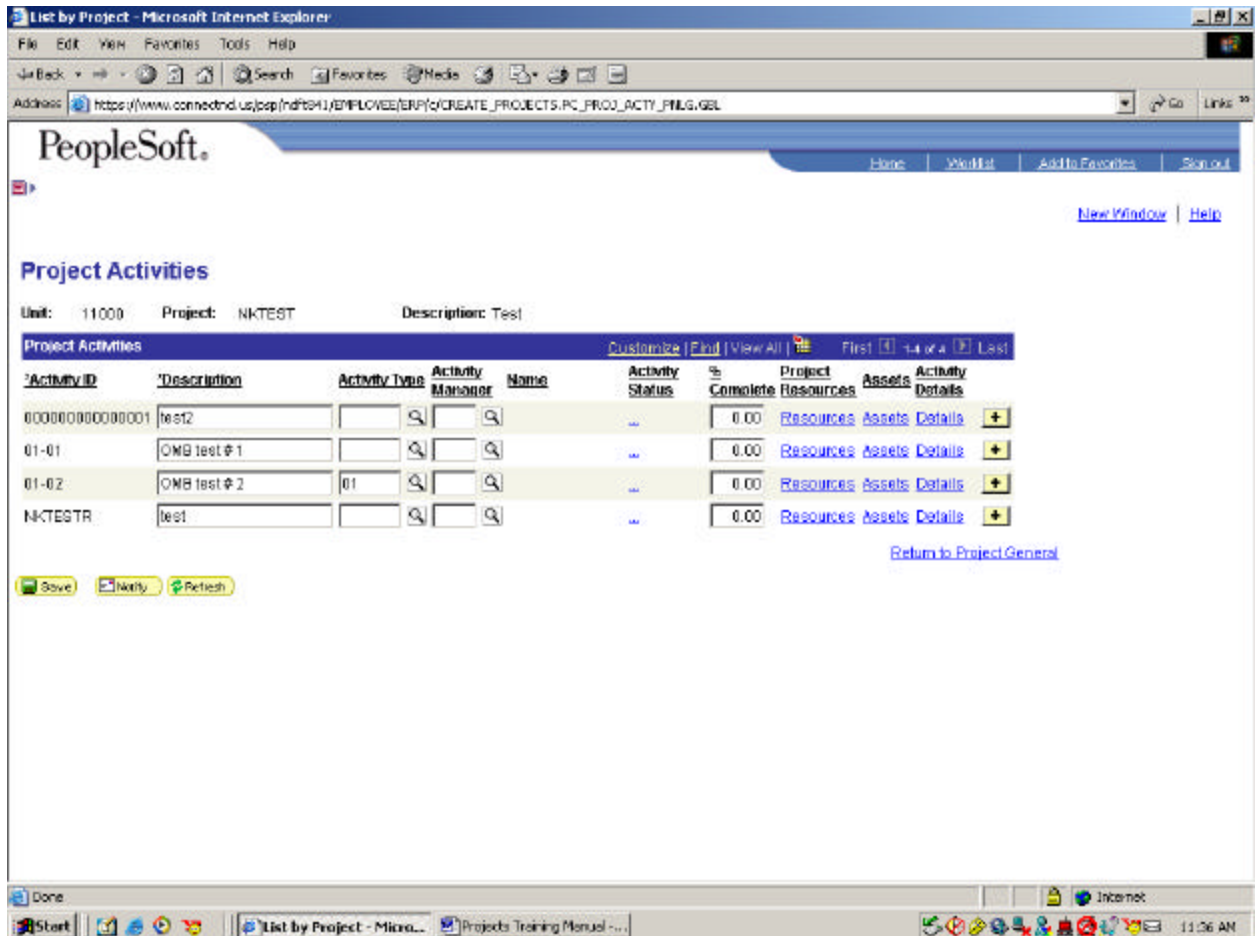
Search Results
View All First 177 of 77 Last

Business Unit	Project	Description	Project Type
11000	00000000000000	test	(blank)
11000	00000000000112	test	(blank)
11000	00000000000113	test	02
11000	00000000000124	Website	01
11000	00000000000125	update	02
11000	00000000000126	update	(blank)
11000	00000000000128	update	(blank)
11000	00000000000148	test project	(blank)
11000	00000000000149	Test Prod Setup	02
11000	00000000000150	Test Prod Setup	02
11000	00000000000151	C Dup Test	01

- Business Unit: Projects Business Unit. Click on the magnifying glass icon  to select from valid values.
- Project: Enter the Project ID – if known. Click on the magnifying glass icon  to select from valid values.
- Description: Enter the Project Description – if known.
- Project Type: Optional. Enter the Project Type – if known. Click on the magnifying glass icon  to select from valid values.

Note: If the project will be using 'Standard Activities', you must select a project type.

- Click **Search** to pick from the returned list of Projects that fit your search criteria.
- Click on the link to the project you want to select.



Project Activities

Unit: 11000 Project: NKTEST Description: Test

Activity ID	Description	Activity Type	Activity Manager	Name	Activity Status	% Complete	Project Resources	Assets	Activity Details
0000000000000001	test2					0.00	Resources	Assets	Details +
01-01	OMB test #1					0.00	Resources	Assets	Details +
01-02	OMB test #2	01				0.00	Resources	Assets	Details +
NKTESTR	test					0.00	Resources	Assets	Details +

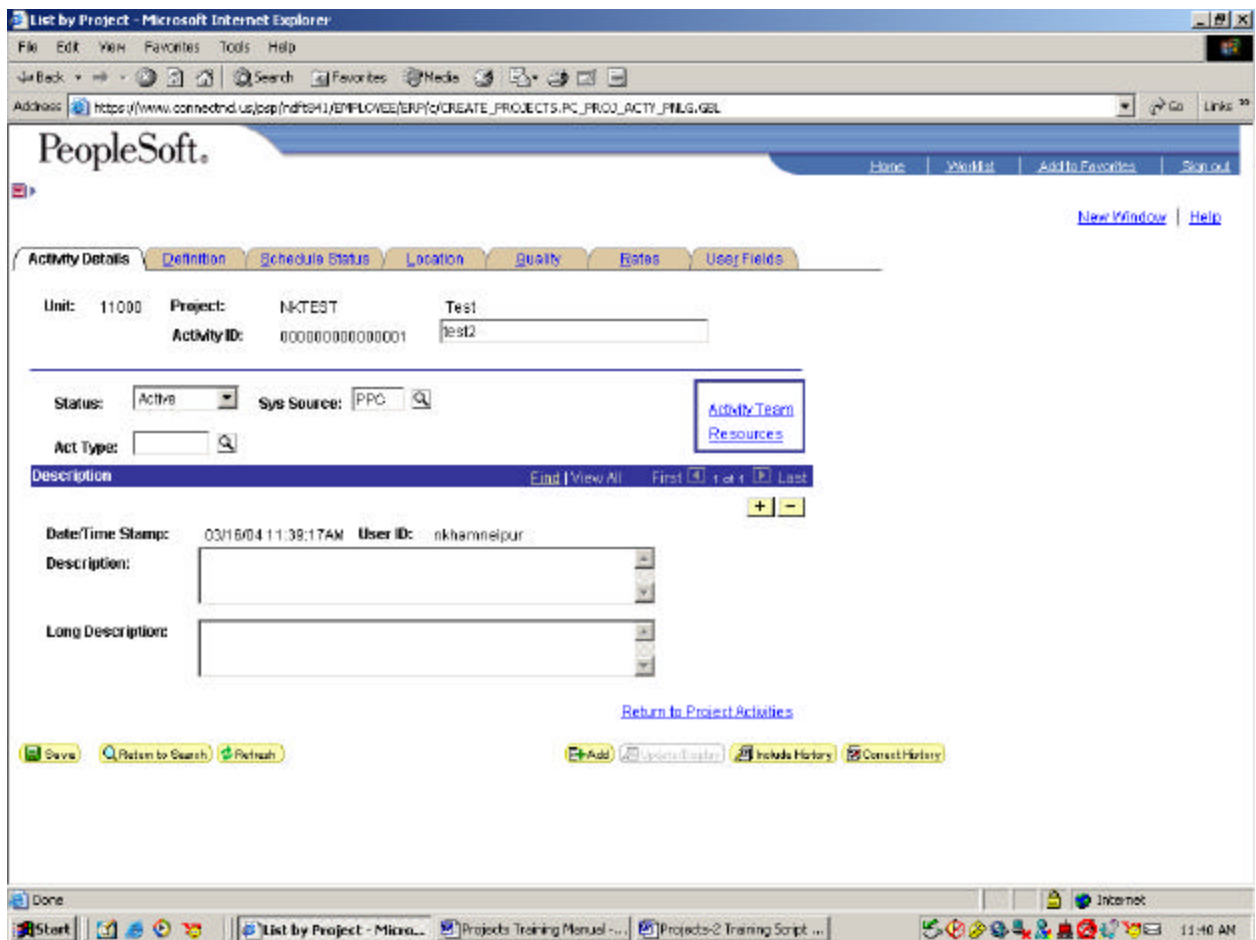
[Return to Project General](#)



Save Notify Refresh

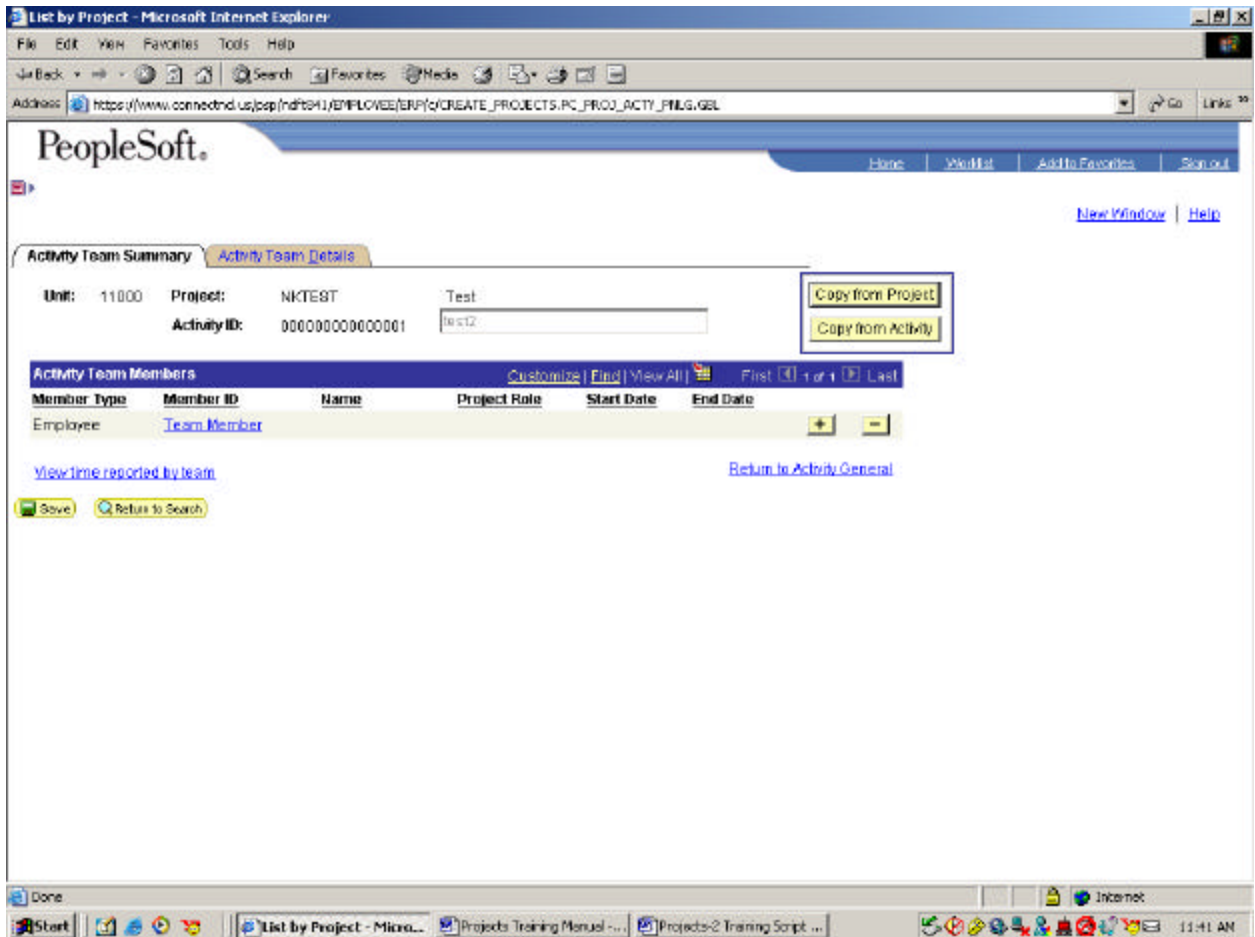
- Activity ID: Activities are the individual tasks or events that make up a project.
- Description: Entered description for the Activity.
- Activity Type: Optional.
- Select the Details hyperlink to access the activity definition pages.
- Activity Status: Activities use the same Status Types as projects. PeopleSoft Projects maintains a history of status changes with regard to a specific activity.
- Project Resources: The page allows you to view project resource transactions associated to this activity.
- Activity Details: The page allows you to define general information about the activity.

Activity Details

- The Activity Details page is very similar to the Project Details page. It allows you to define general information about the activity.



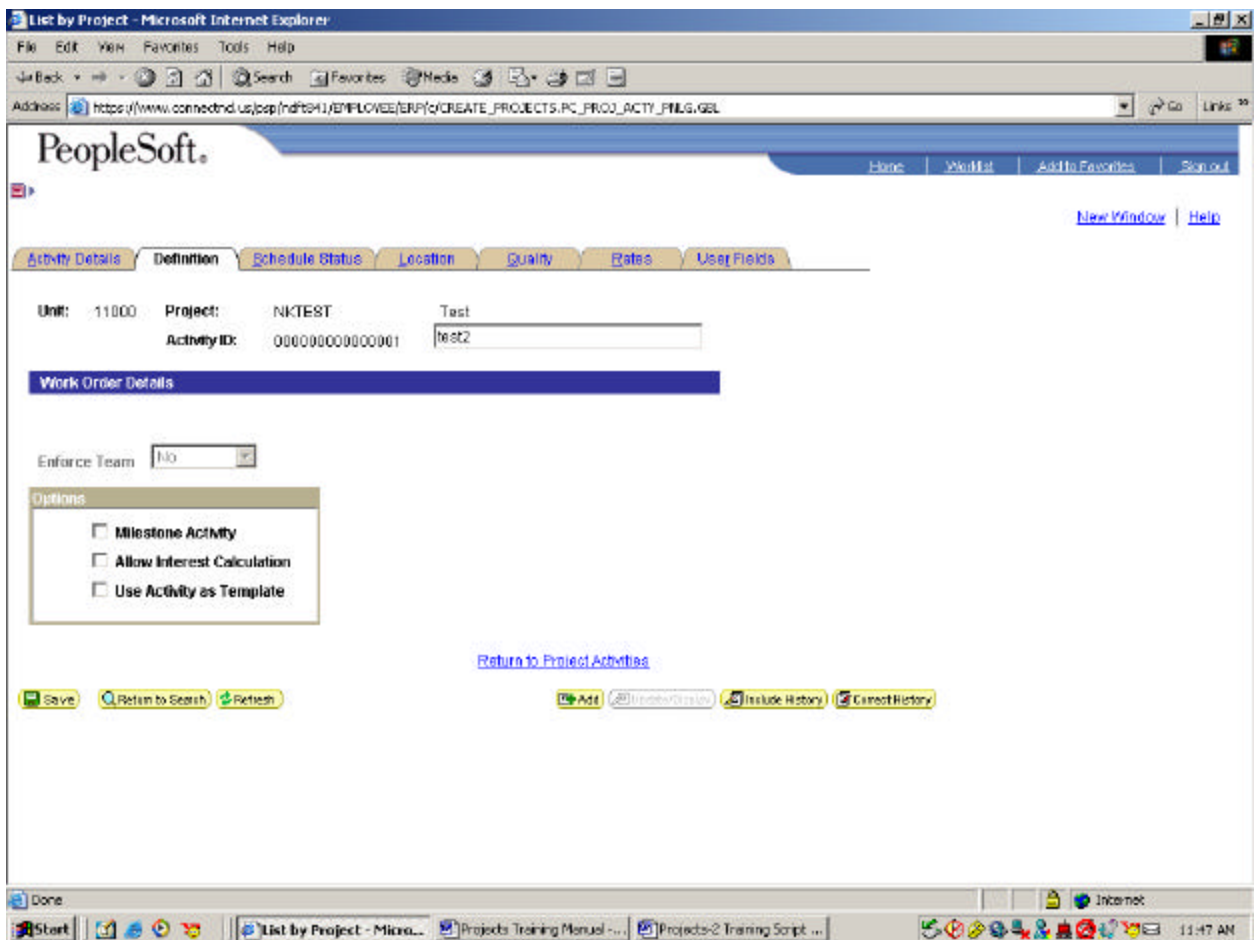
- [Activity Team](#) hyperlink: Here you can list the employees that are working on this Activity.
- Use the [Team Member](#) link to specify the employee name and role.
- Use the add icon  to add lines for more Team Members or the minus icon  to delete a Team Member.
- Once Team Members have reported time to this Activity, the [View time reported by team](#) link will take you to a chart that shows time reported by team member.



- Click on the **Copy from Project** button to select employees to add from the Project Team page.
- Click on the **Copy from Activity** button to select employees to add from another activity within the same Project.
- Click on the [Return to General Activity](#) to return to the Activity General page.
- You can click on the other tabs to define information about your individual activity, as described below.

Activity Definition Tab

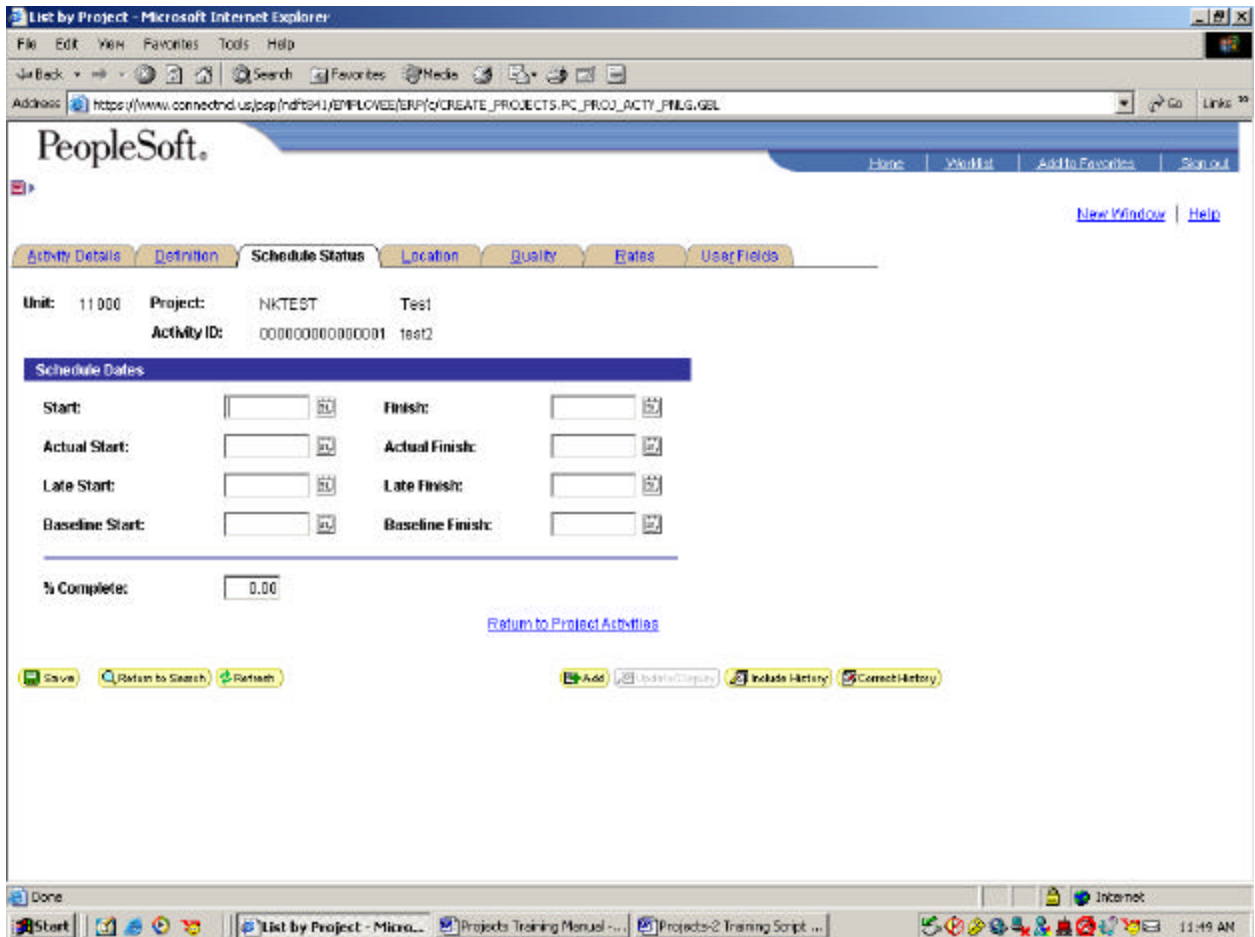
- Use the Definition page to assign the WBS ID if you are using Work Breakdown Structure.



- Use Activity as Template: Check this checkbox if you want to be able to copy this Activity to create a new Activity using the Project Copy Functionality.

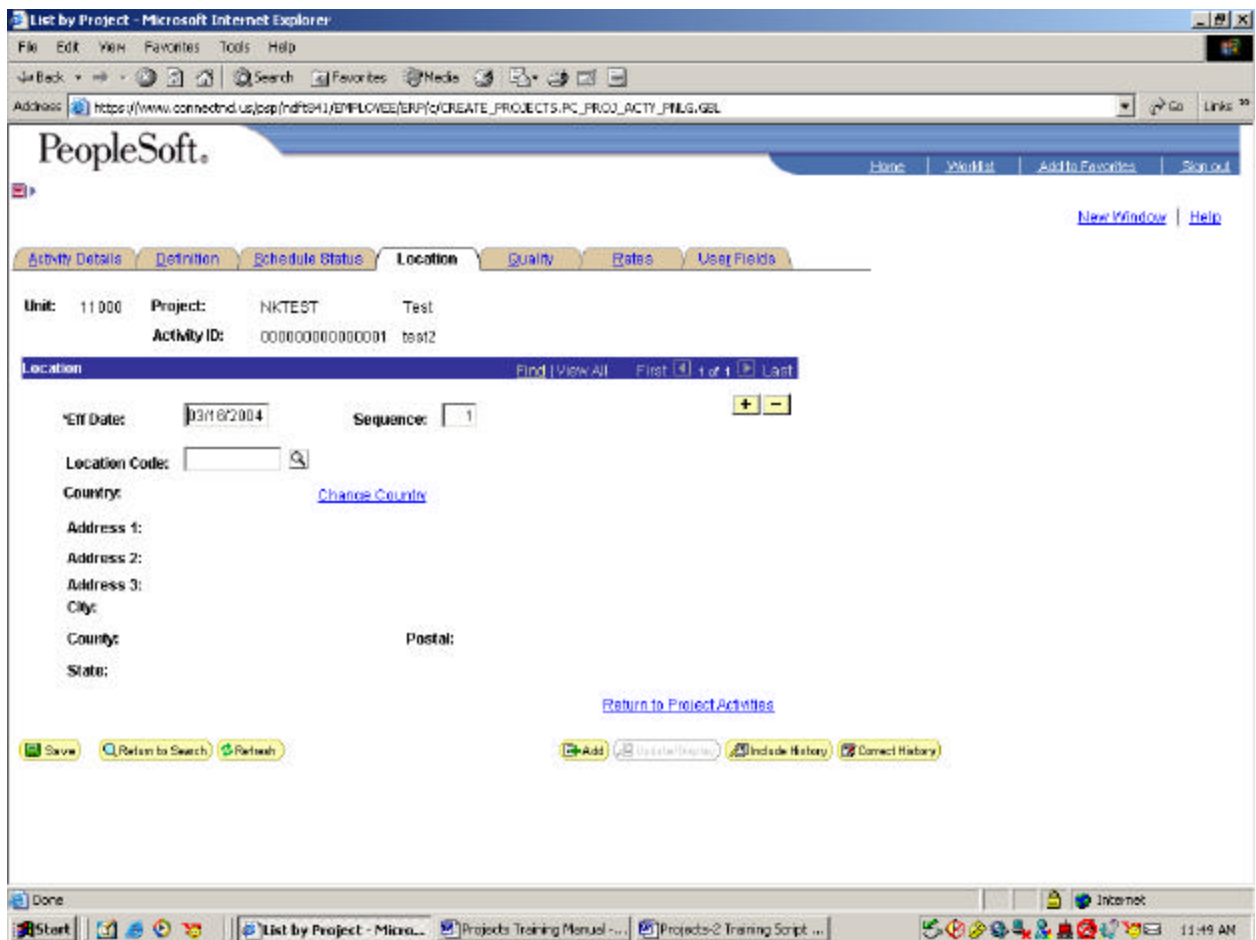
Schedule Status Tab

- Optional.
- The Schedule Status page allows you to track start and finish dates for your activities.
- The Percent Complete field is manually maintained and displayed on the Project Activities page as well. It can be maintained in both places.




Location Tab

- Optional.
- You can track the location of individual activities within a project.
- Activities may have different locations than the project.

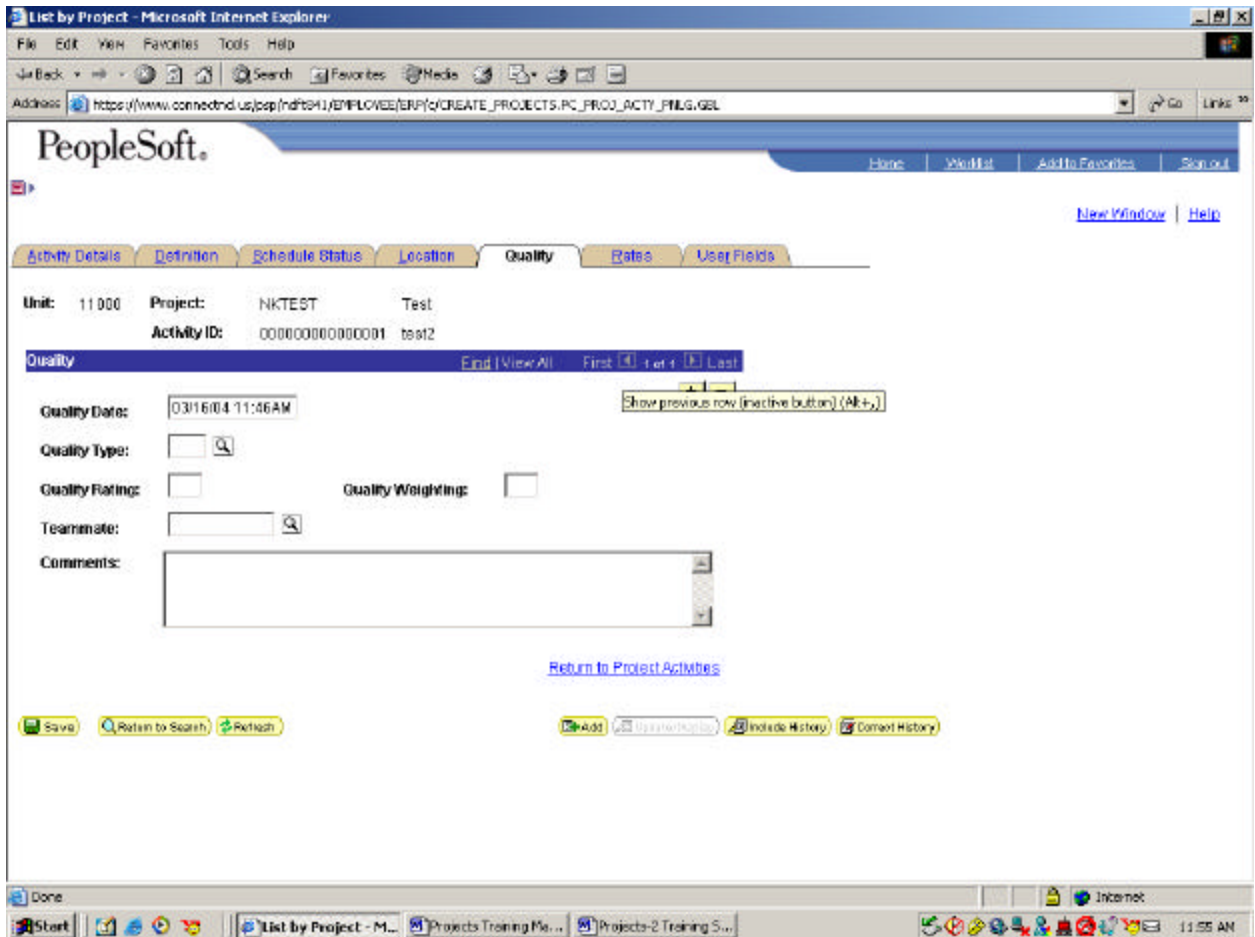


- Locations are not required. This page is effective dated to keep an audit trail as well as allow multiple locations.

- Location Code: Click on the magnifying glass icon  to see a list of valid values.

Quality Tab

- Optional.
- You can track any aspect of an activity's quality, using quality types.
- This page also records the project team member that determined the rating as well as any comments on the rating.



PeopleSoft

Home | What's Hot | Add to Favorites | Sign out

[New Window](#) | [Help](#)

Activity Details | Definition | Schedule Status | Location | **Quality** | Rates | User Fields

Unit: 11 000 Project: NKTEST Test
Activity ID: 000000000000001 test2

Quality End | View All First [4] of 1 Last
Show previous row (inactive button) (Alt+P)

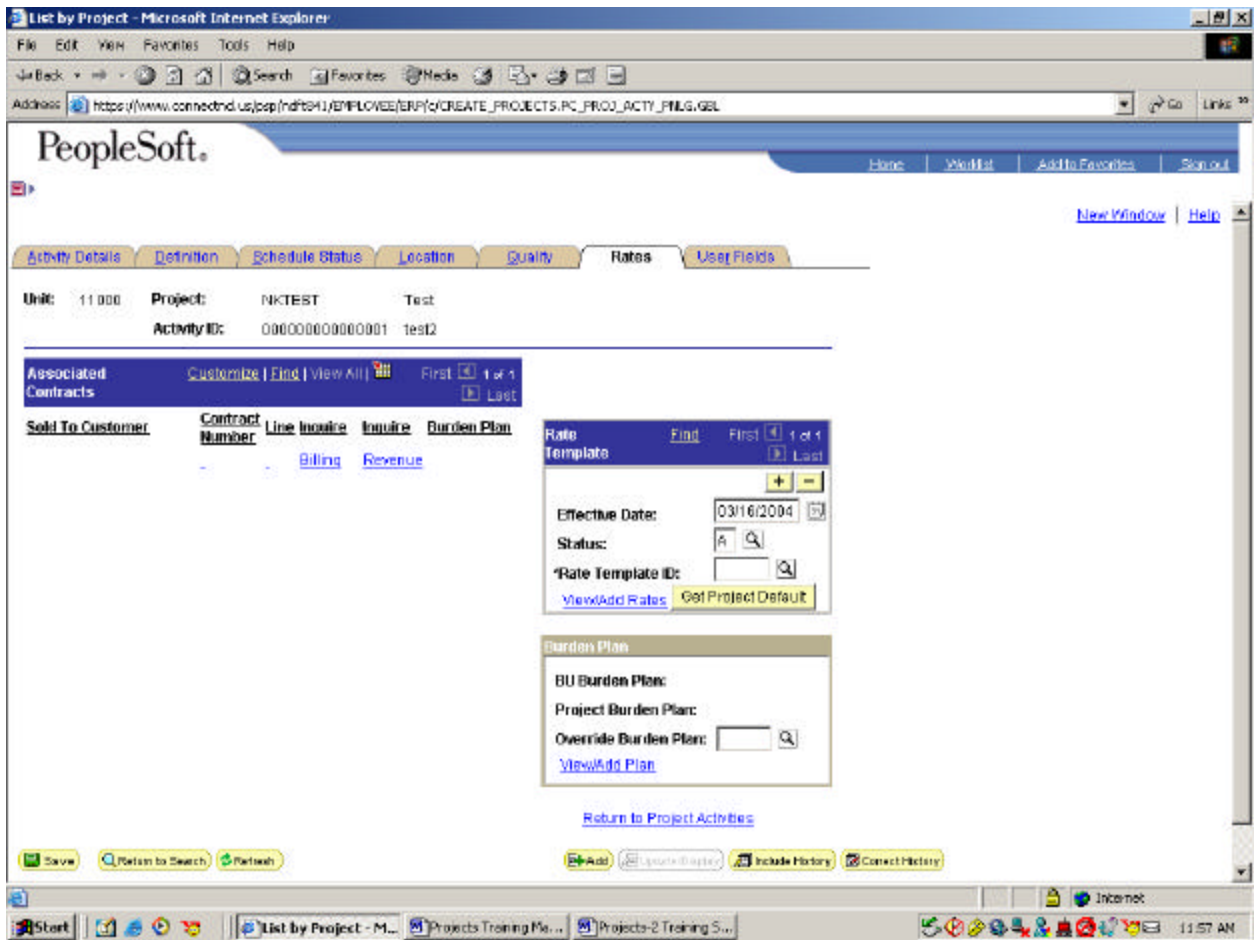
Quality Date: 03/16/04 11:46 AM
Quality Type: ☐
Quality Ratings: ☐ Quality Weighting: ☐
Teammate:
Comments:

[Return to Project Activities](#)

Save Return to Search Refresh Add Include History Correct History

Rates Tab

- Optional.
- The Rates page displays the current contract information associated with the Project/Activity ID.
- This area may appear blank if PeopleSoft Contracts is not being used.



User Fields Tab

- User Fields are available to store custom information specific to your company.
- Use based on Business Unit needs.

Microsoft Internet Explorer - List by Project

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS_PC_PROJ_ACTY_PTLG.GBL




PeopleSoft

Home | What's New | Add to Favorites | Sign out








[New Window](#) | [Help](#)

Activity Details | Definition | Schedule Status | Location | Quality | Rates | User Fields










































Unit: 11 000 Project: NKTEST Test
Activity ID: 0000000000000001 test2

User 1: User Currency: 
User 2: Amount 1:
User 3: Amount 2:
User 4: Amount 3:
User 5: Date 1: 
Date 2: 

[Return to Project Activities](#)

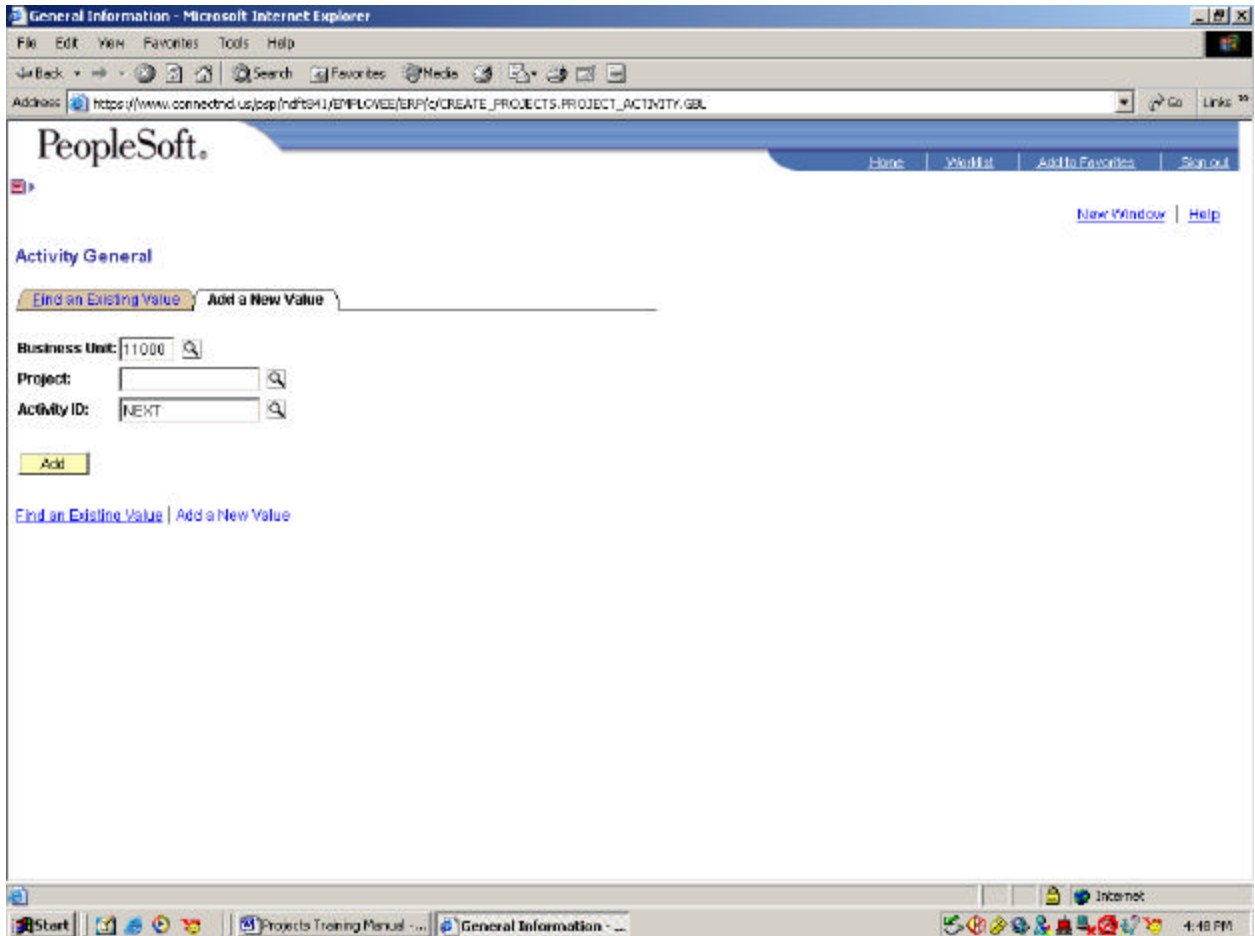
 Save  Return to Search  Refresh  Add  Update History  Include History  Connect History



Done

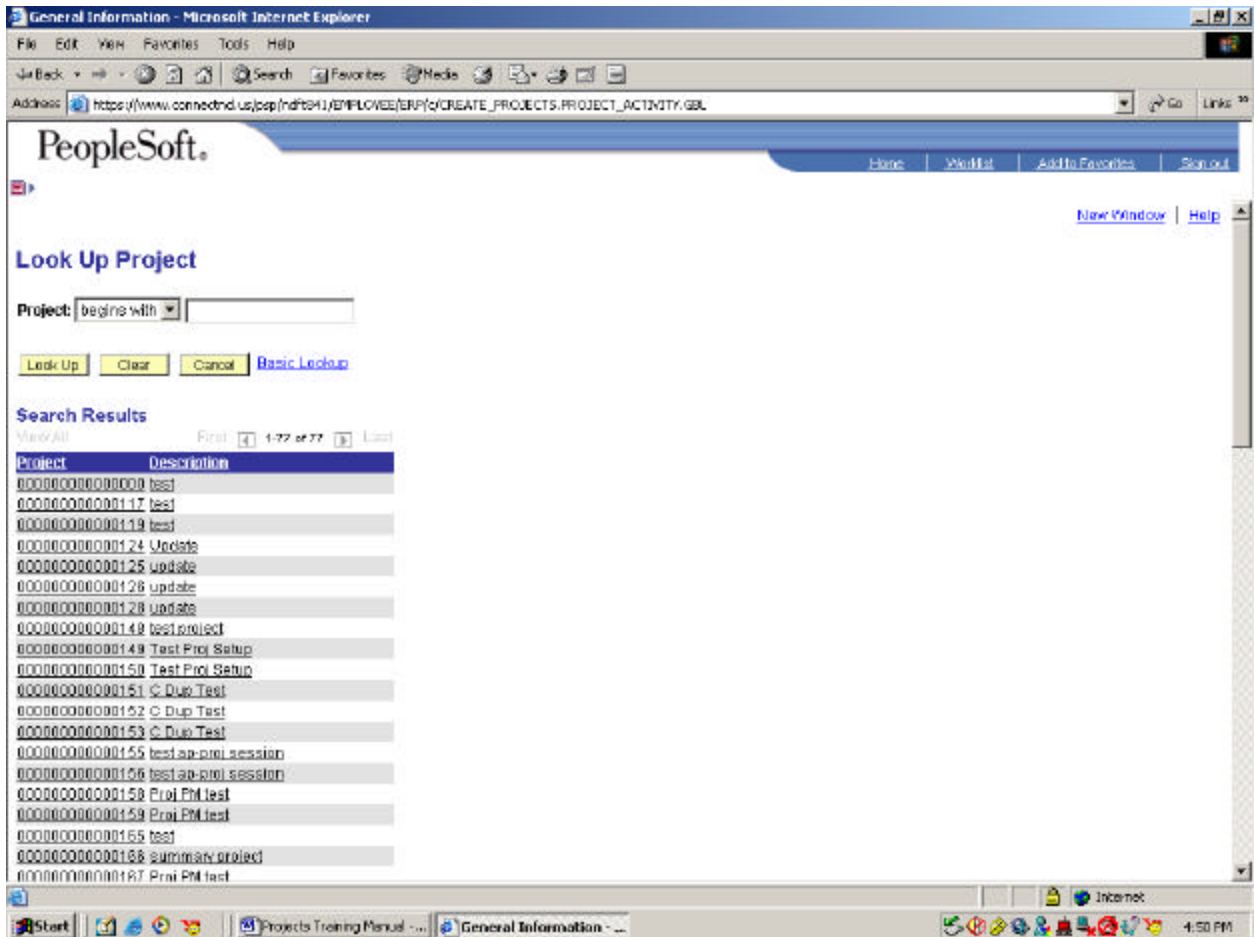
Start |                                          <

Creating Activities

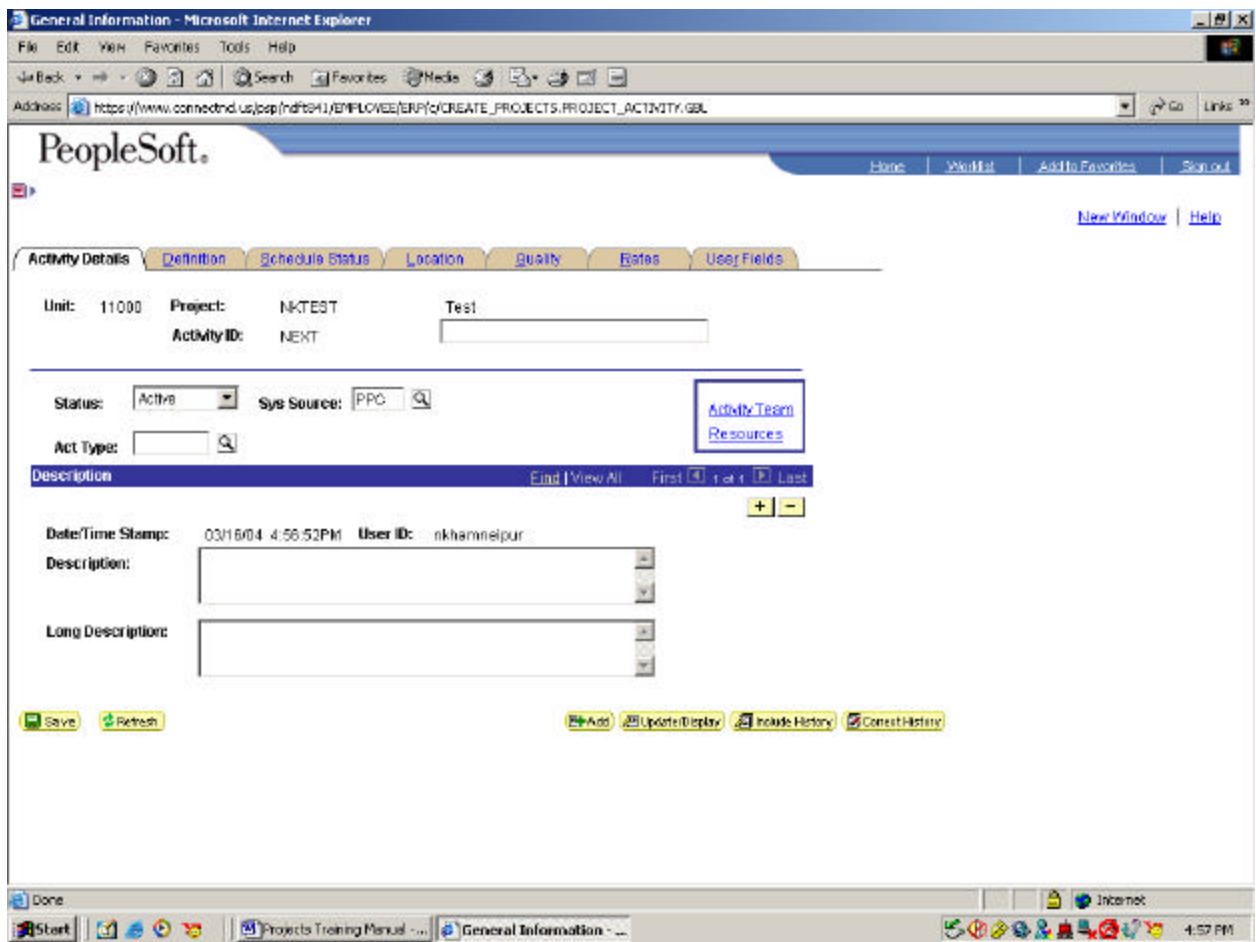
Project > Activities > General Information > Add a New Value



- Business Unit: Projects Business Unit. Click on the magnifying glass icon  to see a list of valid values.
- Project ID: Select the appropriate Project ID to add this Activity to. Click on the magnifying glass icon  to see a list of valid values.



- Activity ID: Either leave the Activity ID to 'NEXT' for auto numbering, or type in the Activity ID.
- Click .



General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf0241/EMPLOYEE/EMP/q/CREATE_PROJECTS.PROJECT_ACTIVITY.GBL

PeopleSoft.

Home WorldMap Add to Favorites Sign out

New Window Help

Activity Details Definition Schedule Status Location Quality Rates User Fields

Unit: 11000 Project: NKTEST Test

Activity ID: NEXT

Status: Active Sys Source: PPC

Act Type:

Description End View All First Last

Date/Time Stamp: 03/16/04 4:56:52PM User ID: nkhamneipur

Description:



Long Description:

Save Refresh Add Update/Display Include History Connect History

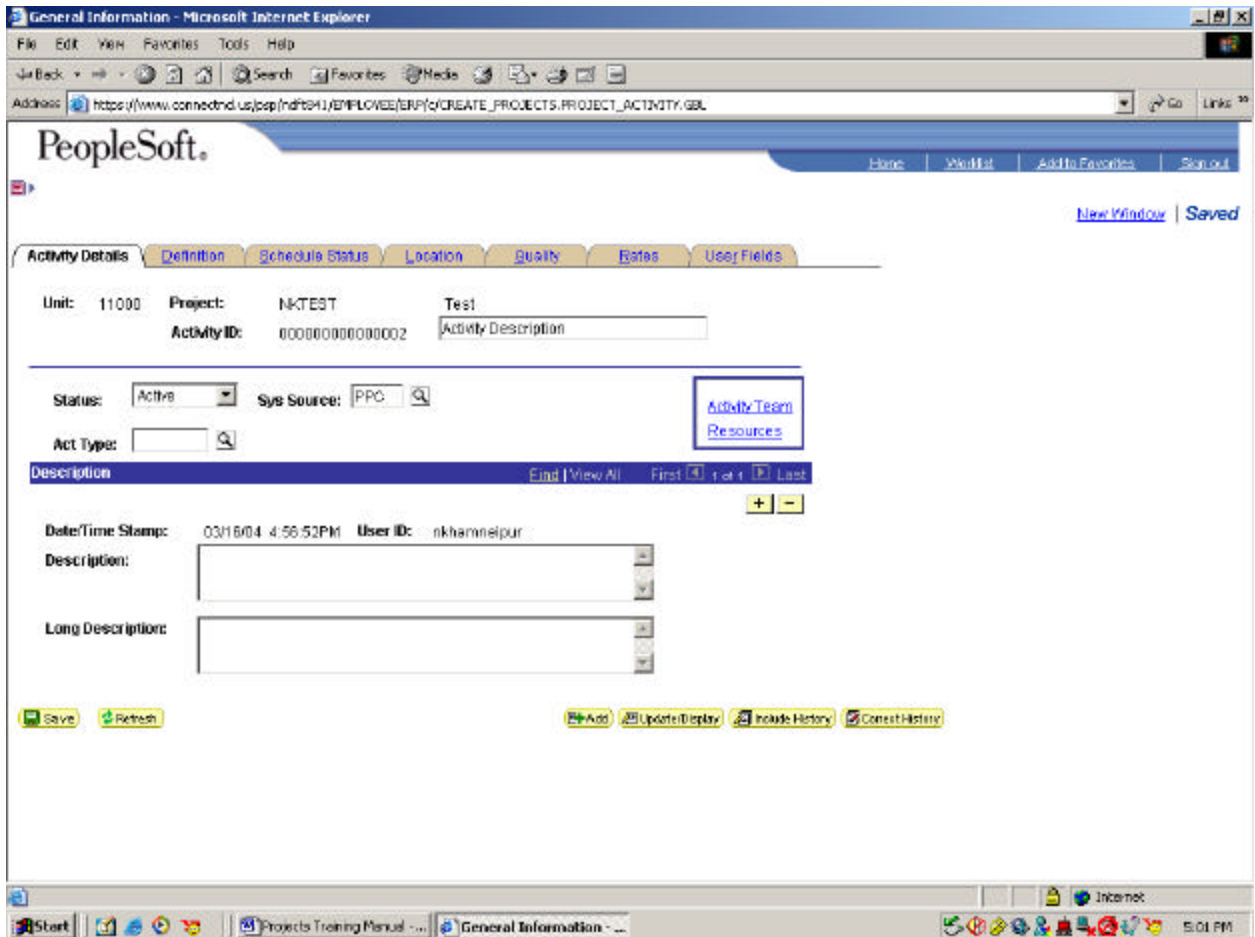
Done

Start Projects Training Manual - ... General Information - ...

Internet 4:57 PM

- Description: Enter the appropriate description for the Activity.
- Activity Type: Optional. Click on the magnifying glass icon  to see a list of valid values.
- Click .

Note: When you save the Activity, the auto-numbering will take affect (if you left the Activity ID default NEXT).



The screenshot shows a web browser window titled "General Information - Microsoft Internet Explorer" displaying the PeopleSoft "Activity Details" page. The page has a blue header with the PeopleSoft logo and navigation links like "Home", "What's Hot", "Add to Favorites", and "Sign out". Below the header, there are tabs for "Activity Details", "Definition", "Schedule Status", "Location", "Quality", "Rates", and "User Fields". The "Activity Details" tab is active, showing fields for Unit (11000), Project (NKTEST), Test (Test), and Activity ID (0000000000000002). There are also fields for Status (Active), Sys Source (PPC), and Act Type. A "Description" section includes a "Date/Time Stamp" (03/16/04 4:56:52PM), "User ID" (nkhamneipur), and a "Description" field. At the bottom, there are buttons for "Save", "Refresh", "Add", "Update/Display", "Include History", and "Connect History".

- Enter any appropriate information on the additional Activity tabs:
 - Schedule Status
 - Location
 - Quality
 - Rates
 - User Fields

Resources


- The transactions that post to a project’s activities are call “Resources.”
- Resources can represent costs, revenue, budget amounts, employee hours, and more.




Viewing Resources

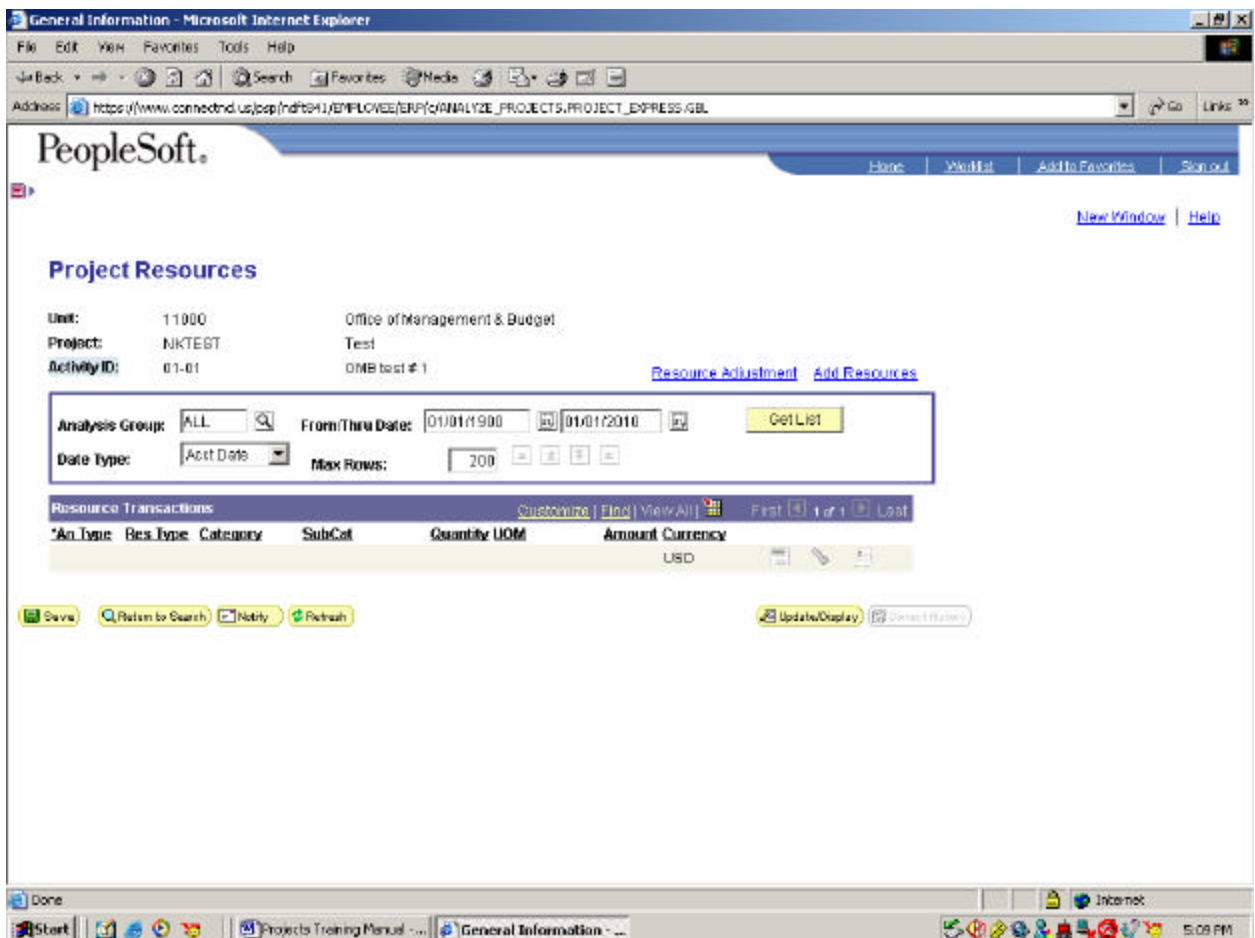
- To see Resources, navigate to an Activity within a Project.

Projects > Resources > General Information

[illegible]

- Business Unit: Projects Business Unit. Click on the magnifying glass icon  to see a list of valid values.

- Project: Select the appropriate Project ID. Click on the magnifying glass icon  to see a list of valid values.
- Activity ID: Select the appropriate Activity ID. Click on the magnifying glass icon  to see a list of valid values.
- Description: Enter the appropriate Activity Description.
- Activity Type: Select the appropriate Activity Type. Click on the magnifying glass icon  to see a list of valid values.
- Status as of Effective Date: Active vs. Inactive.
- Select the appropriate Project / Activity whose Resources you want to view.



General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndfbs41/EMPLOYEE/ERP/C/ANALYZE_PROJECTS.PROJECT_EXPRESS.GBL

PeopleSoft.




Home | Wishlist | Add to Favorites | Sign out





[New Window](#) | [Help](#)




Project Resources

Unit: 11000 Office of Management & Budget
 Project: NKTEST Test
 Activity ID: 01-01 OMB test # 1

[Resource Adjustment](#) [Add Resources](#)

Analysis Group: ALL  From/Thru Dates: 01/01/1900  01/01/2010  [Get List](#)



Date Type: Act Date Max Rows: 200    


Resource Transactions [Customize](#) [Find](#) [View All](#)  First  Last 

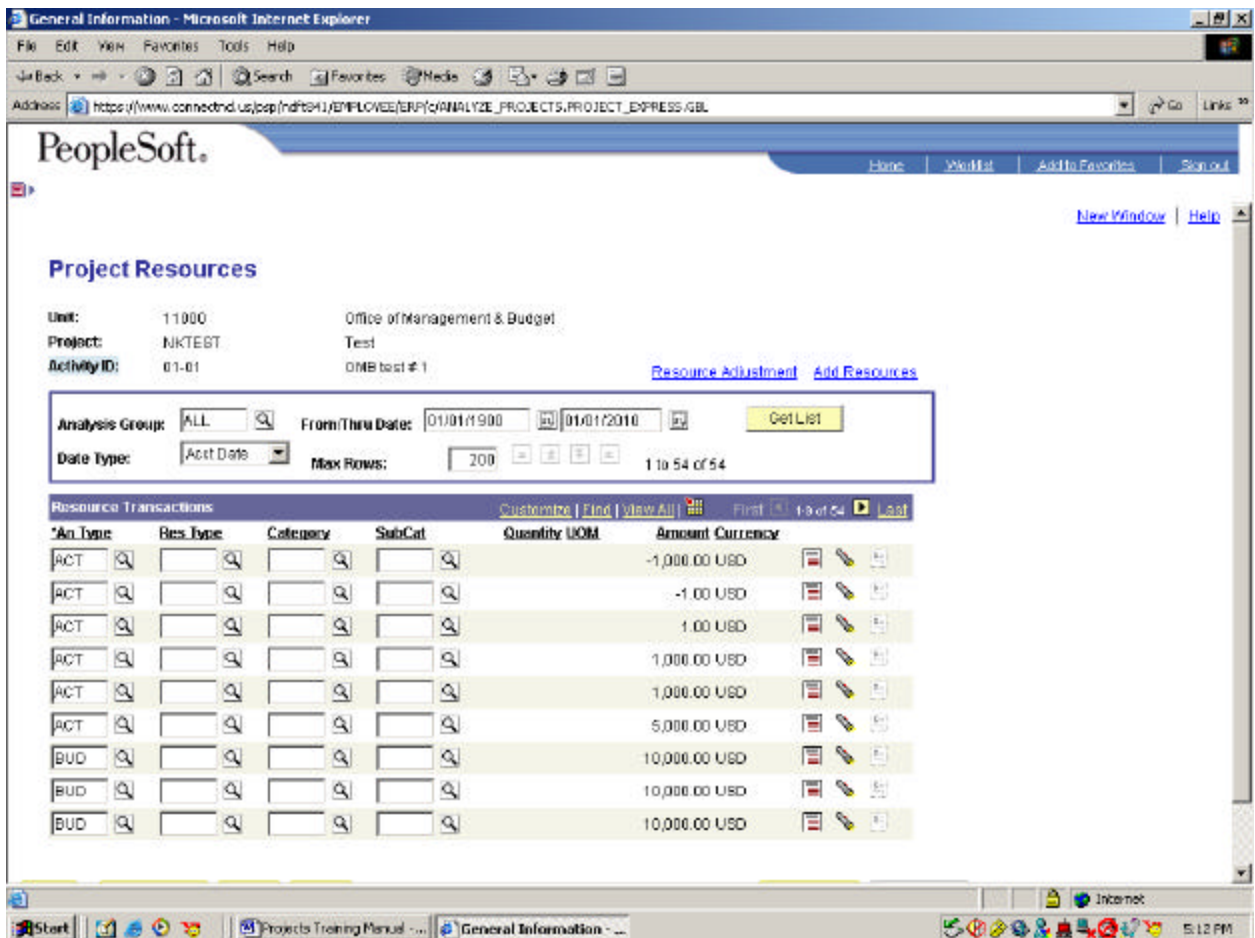
An.Type	Res.Type	Category	SubCat	Quantity	UOM	Amount	Currency
							USD

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Update/Display](#) [Connect History](#)

Done

Start |  | Projects Training Manual - ... | General Information - ... |  | 5:09 PM


- Analysis Group: “ALL”. It will default from your User Preferences – Projects page.
- Enter From/Thru dates. Dates will default from your User Preferences – Projects page.
- Click the  button.



Project Resources

Unit: 11000 Office of Management & Budget
 Project: NKTST Test
 Activity ID: 01-01 OMB test # 1

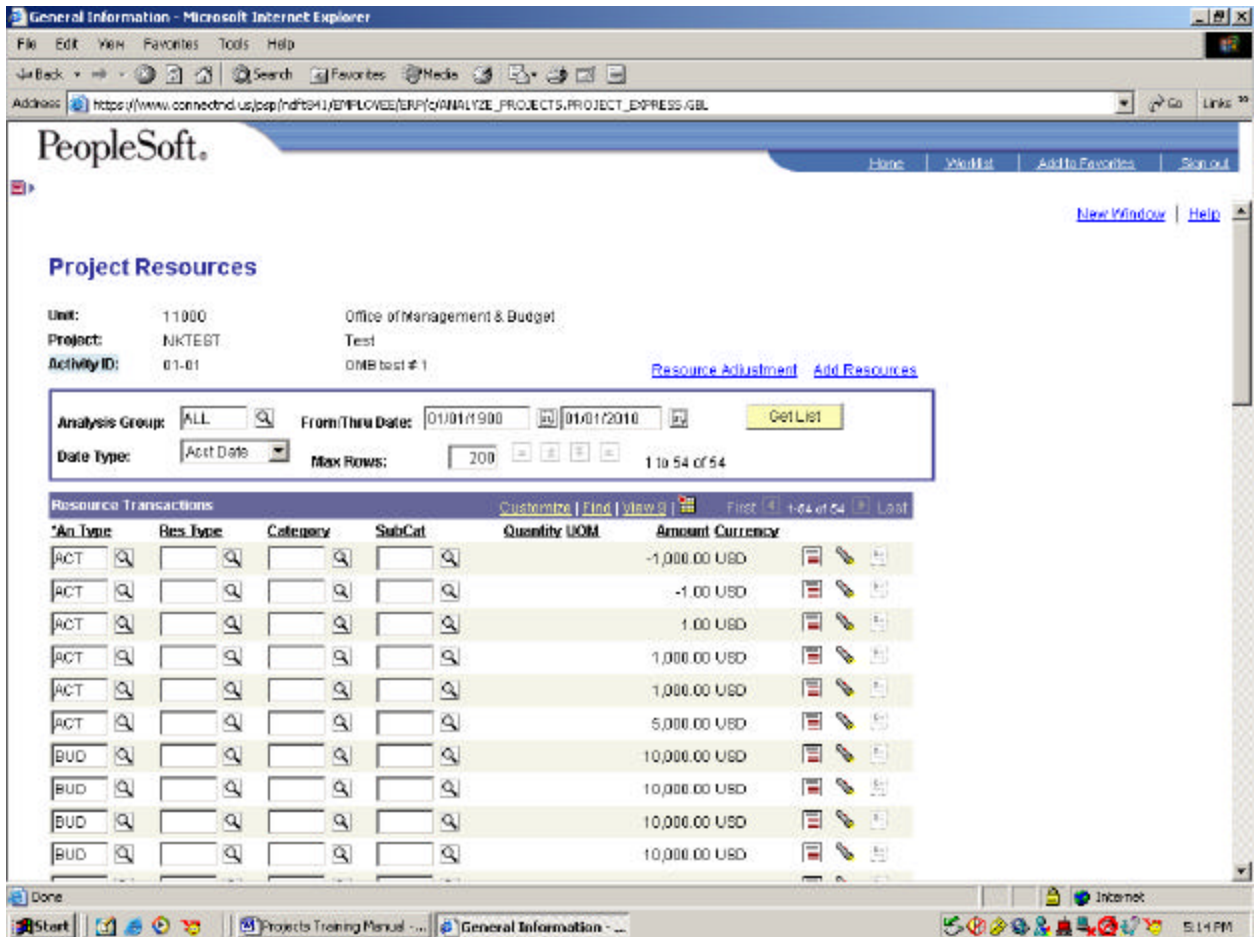
[Resource Adjustment](#) [Add Resources](#)

Analysis Group: From/Thru Dates: to 

Date Type: Max Rows: 1 to 54 of 54

An Type	Res Type	Category	SubCat	Quantity	UOM	Amount	Currency
ACT						-1,000.00	USD
ACT						-1.00	USD
ACT						1.00	USD
ACT						1,000.00	USD
ACT						1,000.00	USD
ACT						5,000.00	USD
BUD						10,000.00	USD
BUD						10,000.00	USD
BUD						10,000.00	USD

- This activity has 54 Resource lines in it.
- Click the [View All](#) hyperlink to see all the resource transactions.



Project Resources


Unit: 11000 Office of Management & Budget
 Project: NJKTEST Test
 Activity ID: 01-01 OMB test #1

[Resource Adjustment](#) [Add Resources](#)

Analysis Group: ALL From/Thru Dates: 01/01/1900 to 01/01/2010 [Get List](#)
 Date Type: Act Date Max Rows: 200 1 to 54 of 54

An Type	Res Type	Category	SubCat	Quantity UOM	Amount Currency
ACT					-1,000.00 USD
ACT					-1.00 USD
ACT					1.00 USD
ACT					1,000.00 USD
ACT					1,000.00 USD
ACT					5,000.00 USD
BUD					10,000.00 USD
BUD					10,000.00 USD
BUD					10,000.00 USD
BUD					10,000.00 USD

Resource Drilling Down

- From the Project Resources page, you can drill down to more information in two ways; Drill to Source or Resource Detail.
- Click on the Resource Detail icon  to view additional information related to this resource transaction. By doing so, you will see all the fields on the PROJ_RESOURCE_TBL related to this transaction.

General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf041/EMPLOYEE/EMP/c/ANALYZE_PROJECT5.PROJECT_EXPRESS.GBL

PeopleSoft.

Home | What's New | Add to Favorites | Sign out

[New Window](#) | [Help](#)

Resource Detail

Unit: 11000 Office of Management & Budget
 Project: NIKTEST Test
 Activity: 01-01 OMB test # 1

Resources Find First 1 of 54 Last

Descr: [Show All Resource Details](#)

An Type	Res Type	Category	SubCat	GL Unit	Quantity	UOM	Amount	Currency
ACT				11000			-1000.00	USD

Rate Type: CRRNT Distribution Status: ☐ AM Unit: 11000 Trans Code:
 Cur Effct: 03/01/2004 PC Status: ☐ Profile ID:
 Trans Date: 03/01/2004 BI Distrib: ☐ Asset ID:
 Acctg Date: 03/01/2004 From GL Unit: 11000 Cost Type:
 Ledger Group: ACTUALS

Proj Currency: USD
 Project Amount: -1000.00

[Customize](#)

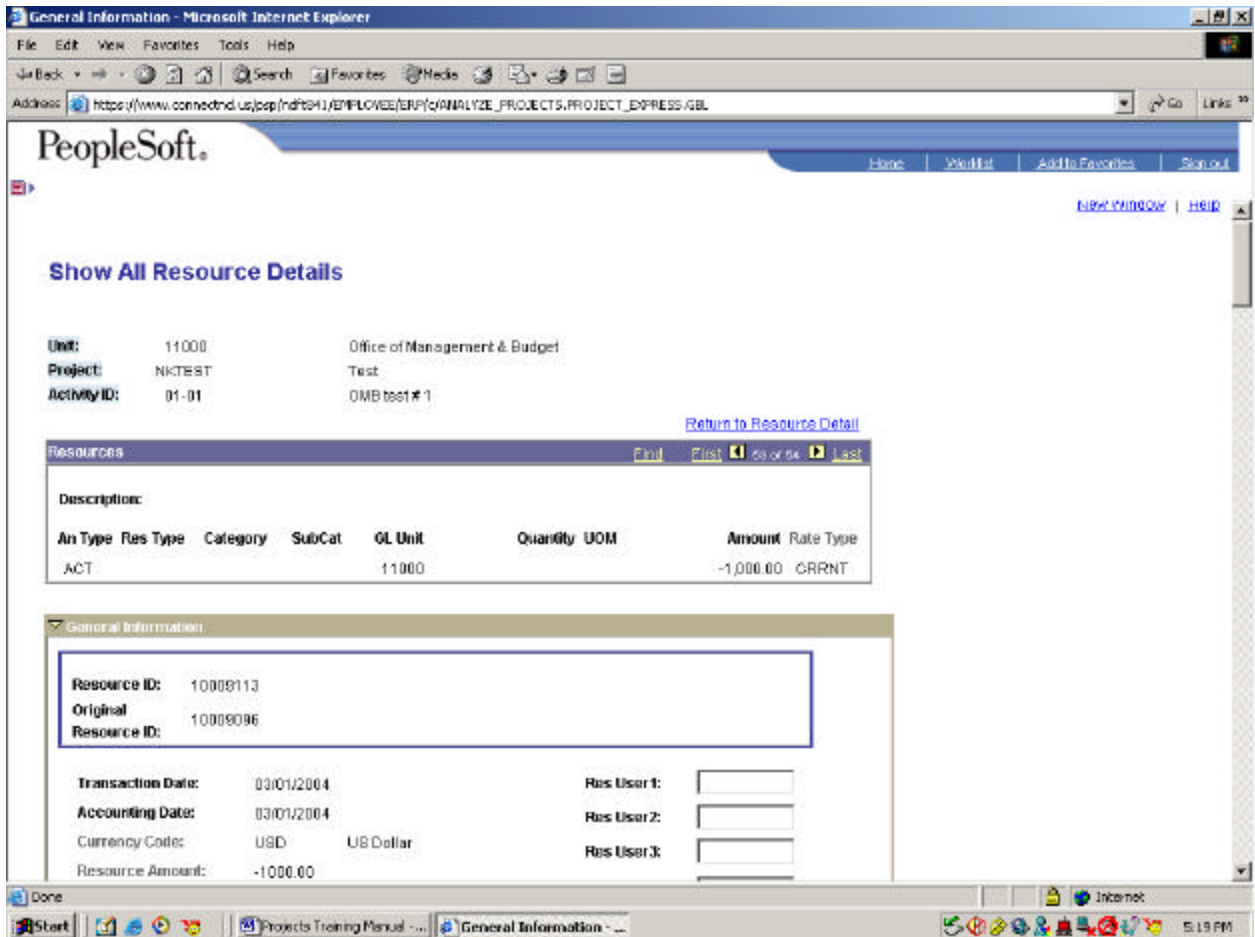
Account	Org Unit	Fund	DeptID	Program	Class	SubsysPC_BU	SubsysActiv ID	Statistics Code
124001	110							

[Return to Project Resources](#)

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Update/Display](#) [Connect History](#)

Start | Projects Training Manual - ... | General Information - ... | 5:18 PM

- Click the [Show All Resource Details](#) to see all details associated with this Resource.



The screenshot shows a Microsoft Internet Explorer browser window displaying the PeopleSoft web application. The address bar shows the URL: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/ANALYZE_PROJECTS/PROJECT_EXPRESS/GBL. The page title is "General Information - Microsoft Internet Explorer". The PeopleSoft logo is at the top left, and navigation links (Home, What's Hot, Add to Favorites, Sign out) are at the top right. A "New Window" and "Help" link are also present.

The main content area is titled "Show All Resource Details". It displays the following information:

- Unit:** 11000 Office of Management & Budget
- Project:** NKTEST Test
- Activity ID:** 01-01 OMB test #1

A "Return to Resource Detail" link is located below the project information.

The "Resources" section is highlighted, showing a table with the following data:

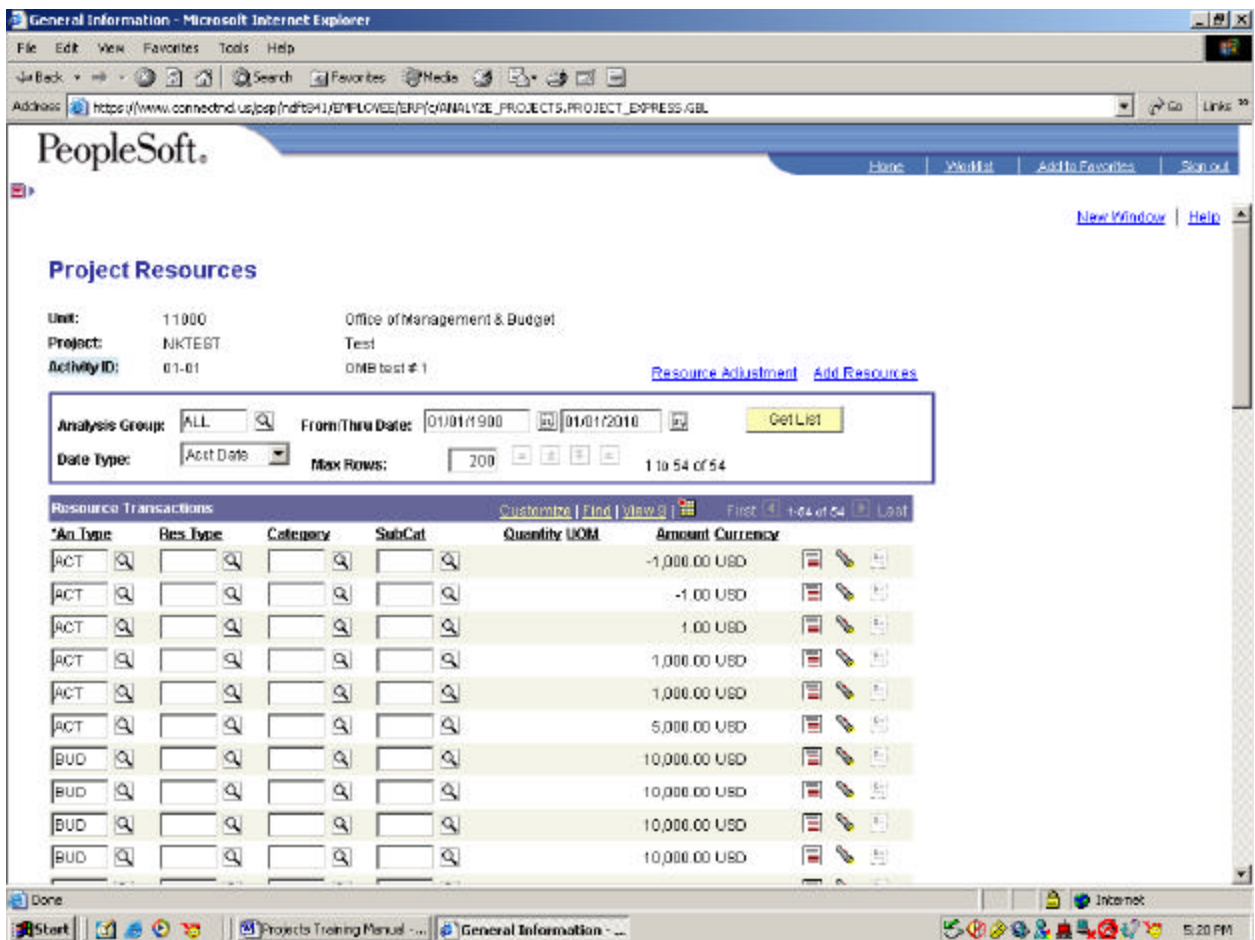
Description:	An Type	Res Type	Category	SubCat	OL Unit	Quantity	UOM	Amount	Rate Type
ACT					11000			-1,000.00	GRANT

Below the table, the "General Information" section is expanded, showing the following details:

- Resource ID:** 10008113
- Original Resource ID:** 10009096
- Transaction Date:** 03/01/2004
- Accounting Date:** 03/01/2004
- Currency Code:** USD US Dollar
- Resource Amount:** -1000.00
- Res User 1:**
- Res User 2:**
- Res User 3:**

The browser's taskbar at the bottom shows the Start button, several icons, and two open windows: "Projects Training Manual - ..." and "General Information - ...". The system clock in the bottom right corner shows 5:19 PM.

- Click on the [Return to Project Resources](#) hyperlink to return to the Resources – General Information page.




Project Resources

Unit: 11000 Office of Management & Budget
 Project: NKTEST Test
 Activity ID: 01-01 OMB test #1


[Resource Adjustment](#) [Add Resources](#)

Analysis Group: ALL From/Thru Dates: 01/01/1900 to 01/01/2010 [Get List](#)
 Date Type: Acct Date Max Rows: 200 1 to 54 of 54

Act Type	Res Type	Category	SubCat	Quantity	UOM	Amount	Currency
ACT						-1,000.00	USD
ACT						-1.00	USD
ACT						1.00	USD
ACT						1,000.00	USD
ACT						1,000.00	USD
ACT						5,000.00	USD
BUD						10,000.00	USD
BUD						10,000.00	USD
BUD						10,000.00	USD
BUD						10,000.00	USD

- Click on the Drill to Source icon  to drill to the source of the Project Resource transactions. Sources can either be initiated in Projects through Resource Add / Adjustment, or one of the feeder systems (AP, PO, AR, GL, etc.)

Example of a Resource created in Projects.

- Click on the Drill to Source icon .

PeopleSoft.

Project Resources

Unit: 11000 Office of Management & Budget
Project: NKTEST Test
Activity ID: 01-01 OMB test #1

[Resource Adjustment](#) [Add Resources](#)

Analysis Group: ALL From: Microsoft Internet Explorer
Date Type: Act Date Max F

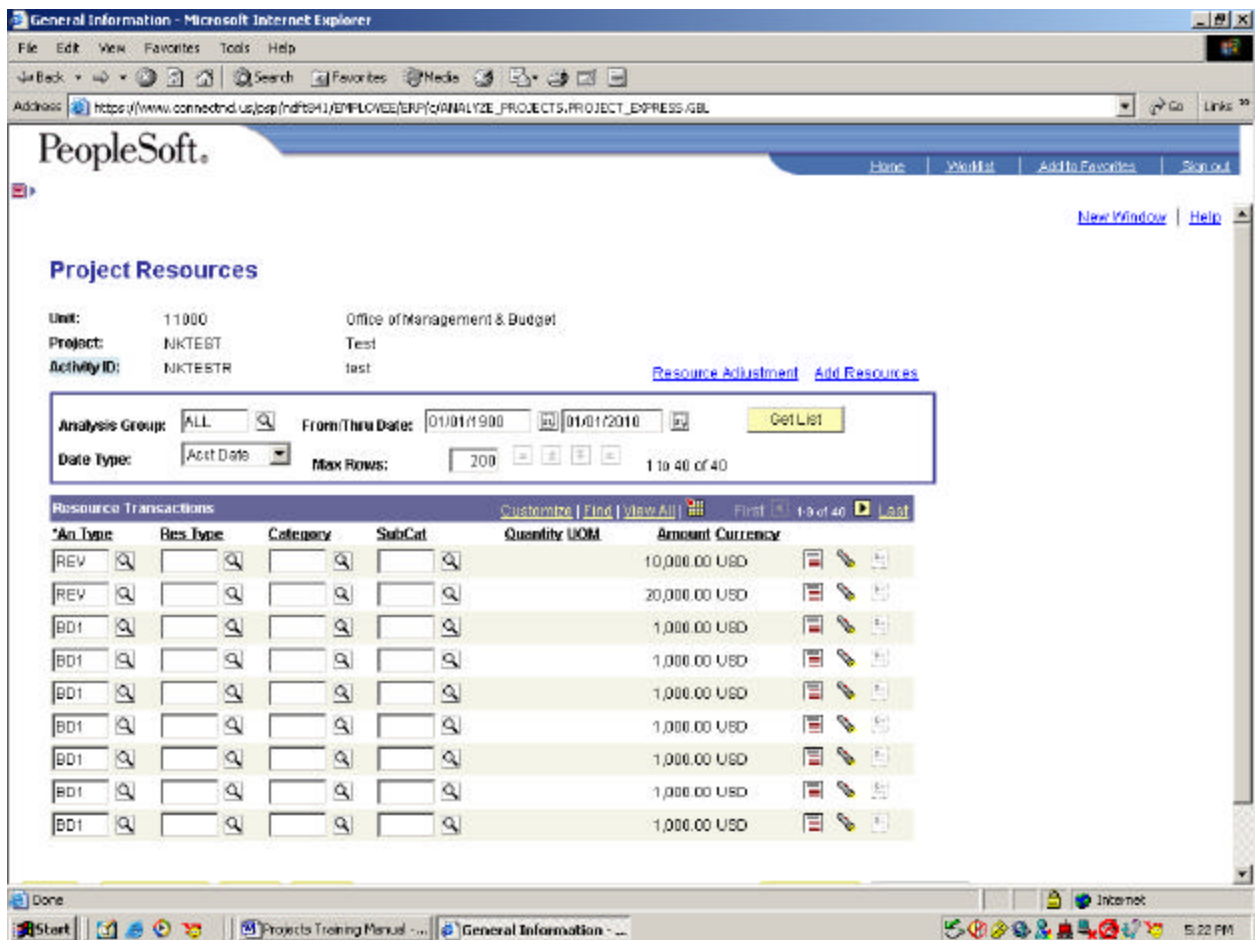
Resource Transactions

*An Type	Res Type	Category	Amount
ACT			-1.00 USD
ACT			1.00 USD
ACT			1,000.00 USD
ACT			1,000.00 USD
ACT			5,000.00 USD
BUD			10,000.00 USD
BUD			10,000.00 USD
BUD			10,000.00 USD
BUD			10,000.00 USD

Warning: Source is Projects - (13100,111)
Current transaction row was generated either through Projects OnLine or Batch.

Example of Drill to Source from a feeder system.

- Note the 'REV' analysis type for 10,000\$



Project Resources

Unit: 11000 Office of Management & Budget
 Project: NKTEST Test
 Activity ID: NKTESTR test

[Resource Adjustment](#) [Add Resources](#)

Analysis Group: ALL From/Thru Dates: 01/01/1900 to 01/01/2010 Get List
 Date Type: Act Date Max Rows: 200 1 to 40 of 40

An.Type	Res.Type	Category	SubCat	Quantity	UOM	Amount	Currency
REV						10,000.00	USD
REV						20,000.00	USD
BD1						1,000.00	USD
BD1						1,000.00	USD
BD1						1,000.00	USD
BD1						1,000.00	USD
BD1						1,000.00	USD
BD1						1,000.00	USD
BD1						1,000.00	USD

- Click on the Drill to Source icon  to view Item Status / Activity in AR.

Note: You must have access to the feeder module pages to use this functionality.

General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/ANALYZE_PROJECTS.PROJECT_EXPRESS.GBL

PeopleSoft.

Home View Mail Add to Favorites Sign out

New Window Help

Item Status Item Activity Item VAT Entries Item Accounting Entries

Unit: 11000 Customer: MB_1000010 Status: Open
Item ID: TEST Name: Kirk Reynolds Days Late: 74

Item Information

Acctg Date: 01/02/2004	Entry Type: IN	Reasons:	Order No:
Balance: 10,000.00	Currency: USD	AR Dist: AR	Contract:
			BI Unit:

Due Date: 01/02/2004	Due Days:	<input type="checkbox"/> Always Allow Discount
Terms: IMMED	Disc Days:	Analyst: CREDIT
Discount Amount:	Date:	Collector: COLLECT
Discount Amount 1:	Date 1:	Sales: TEAM

As Of Date: 01/02/2004	Posted: 01/02/2004	Bill of Lading:
<input type="checkbox"/> Collection	<input type="checkbox"/> User 10	Document:
<input type="checkbox"/> Dispute		PO Ref:
		LIC ID:

Return to Search New

Item Status | Item Activity | Item VAT Entries | Item Accounting Entries

Start Projects Training Manual - ... General Information - ... 5:23 PM

Example of drill down from a 'COM' analysis type created through a Purchase Order in Purchasing.

General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print

Address: https://www.connectnd.us/bsp/ndf041/EMPLOYEE/ERP/q/ANALYZE_PROJECT5.PROJECT_EXPRESS.GBL

PeopleSoft.

Home Worldat Add to Favorites Sign out

New Window Help

Form **Schedule**

Unit: 11900 PO: 000000144

Vendor: AUDIO-001 ID: 000000159 [Vendor Details](#) Buyer: Kaiser, Randy

PO Date: 02/25/2004 PO Status: Dispatched Receipt: Not Recvd Backorder Status: None

Budget Status: Valid Doc Tot Status: Valid

Line	Item	Item Description	Category	PO Qty	UOM	Amount	Status
1	Stuff		01506	4.0000	EA	20000.00 USD	Active

Merch: 20000.00 Adj Amt: Total: 20000.00 USD

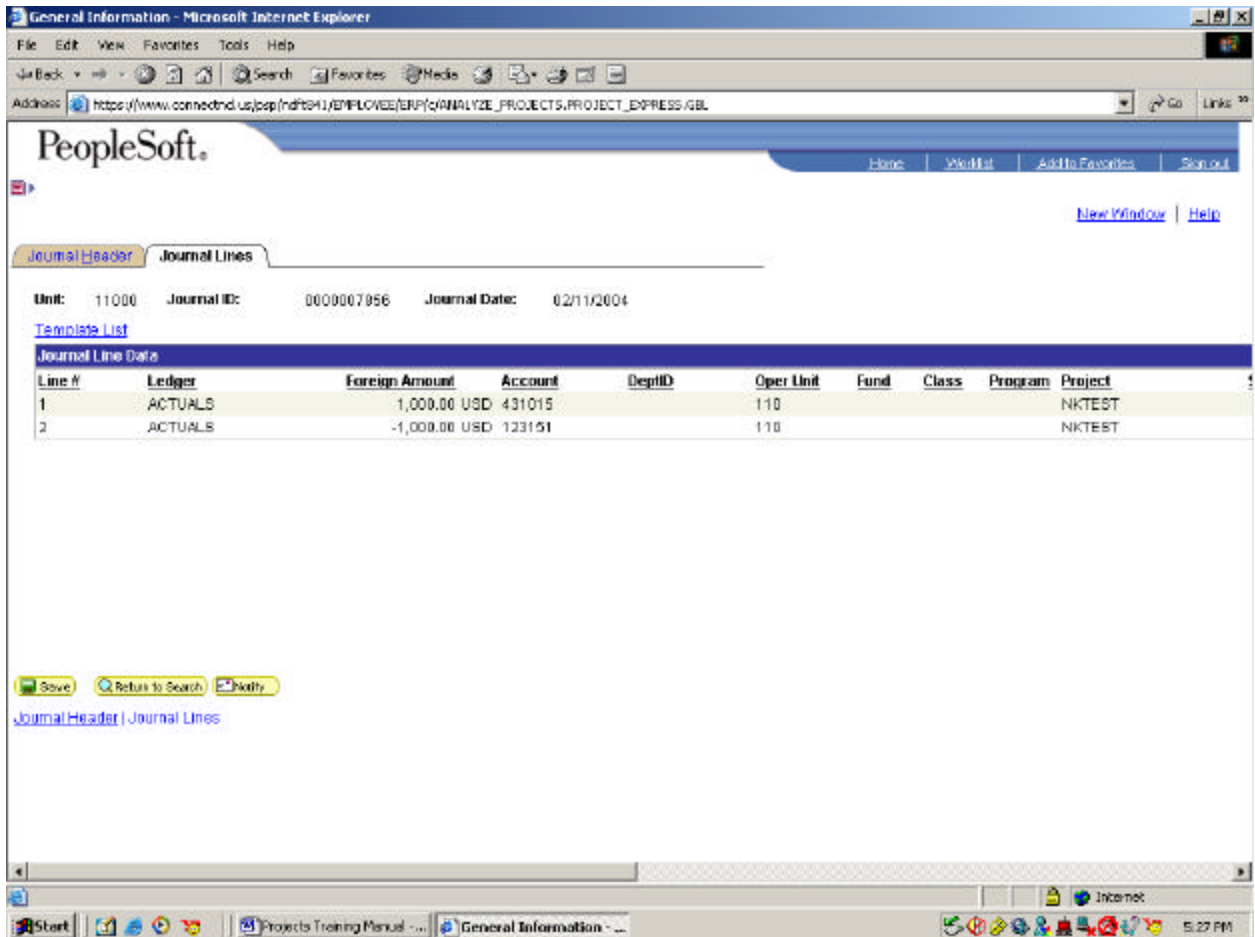
[Header Details](#) [Matching](#) [Header VAT](#) [ALL RTV](#) [Header Comments](#) [Line Details](#) [Line Comments](#) [Document Status](#)

[Return to Search](#) [Library](#) [Related Links](#)

Form | [Schedule](#)

Start Projects Training Manual - ... General Information - ... 5:26 PM

- Example of a 'GLR' analysis type created in General Ledger – Journal.
- You will be navigated to bring up the Journal in General Ledger where you can view the journal lines.

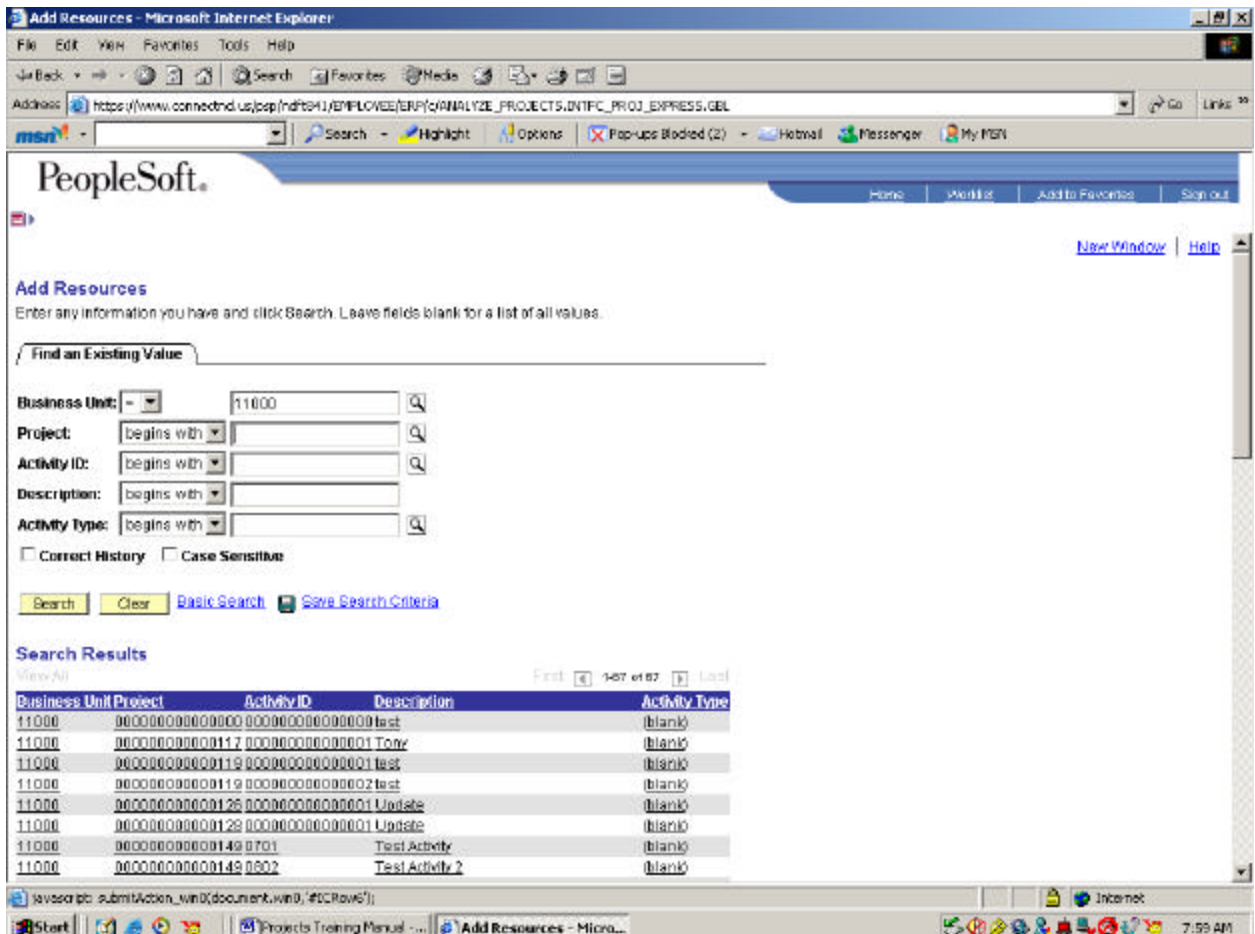


- You can also sort the Resources by any of the columns, by clicking on the column heading.

Adding Resources

Projects > Resources > Add Resources


Note: Resources can be added through either the Resources component, or through the Project General, Activities hyperlink





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Add Resources
Enter any information you have and click Search. Leave fields blank for a list of all values.


Find an Existing Value

Business Unit: 

Project: 

Activity ID: 

Description:





Activity Type: 

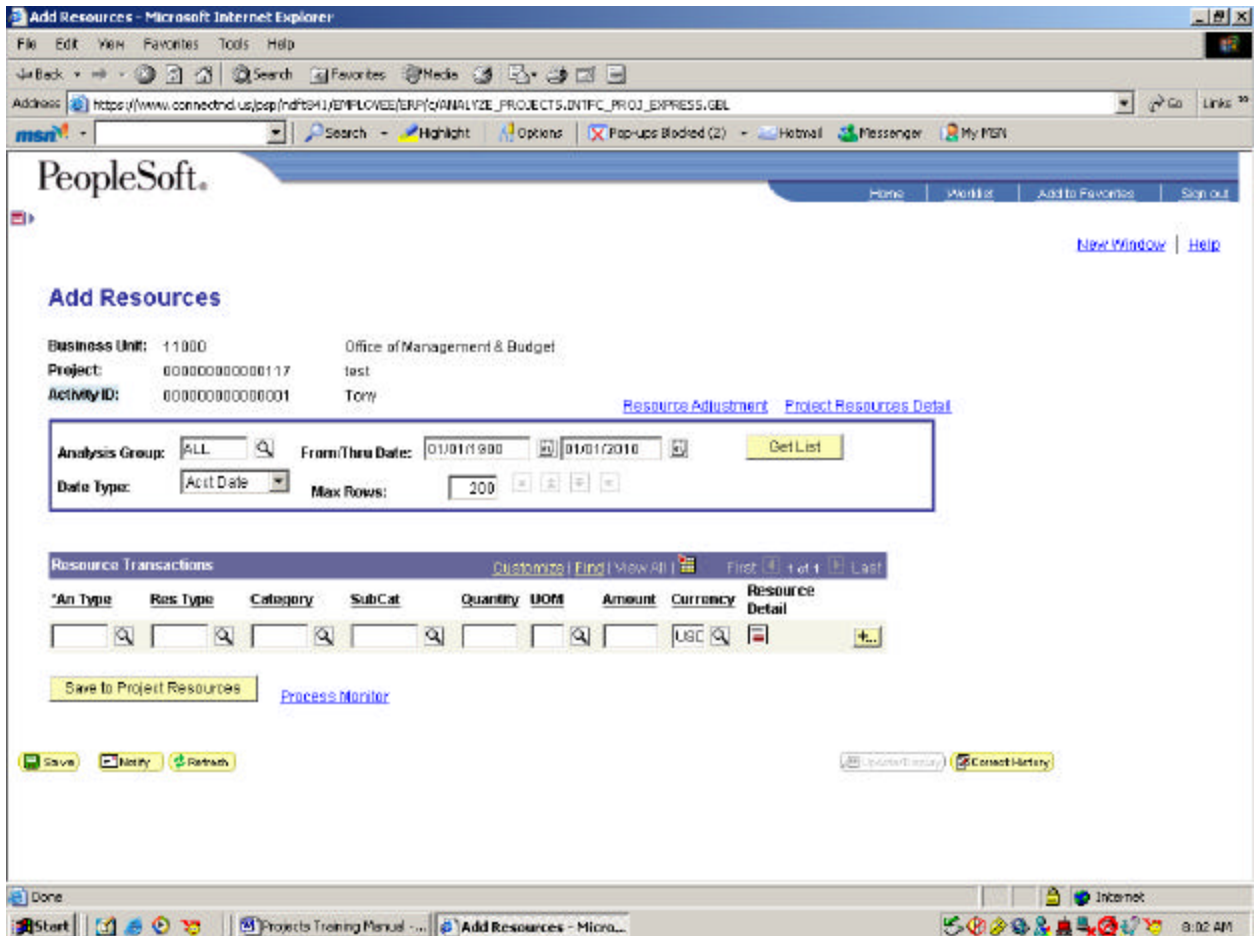
☐ Correct History ☐ Case Sensitive



[Basic Search](#) [Save Search Criteria](#)

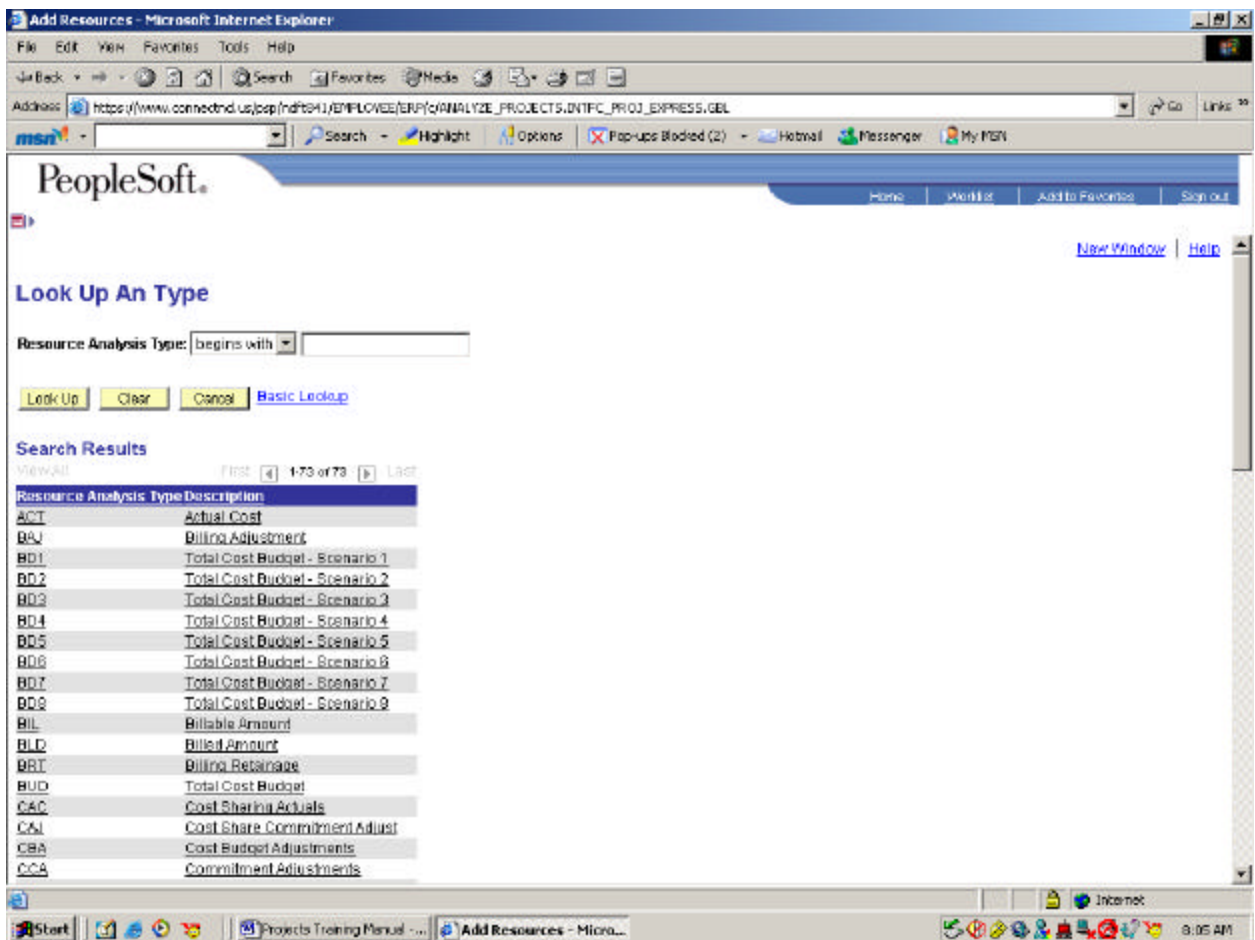
Search Results
View All First 1-407 of 187 Last




Business Unit	Project	Activity ID	Description	Activity Type
11000	00000000000000000000000000000000	00000000000000000000000000000000	test	(blank)
11000	00000000000000000000000000000000	00000000000000000000000000000000	Test	(blank)
11000	00000000000000000000000000000000	00000000000000000000000000000000	test	(blank)
11000	00000000000000000000000000000000	00000000000000000000000000000000	test	(blank)
11000	00000000000000000000000000000000	00000000000000000000000000000000	Update	(blank)
11000	00000000000000000000000000000000	00000000000000000000000000000000	Update	(blank)
11000	00000000000000000000000000000000	00000000000000000000000000000000	Test Activity	(blank)
11000	00000000000000000000000000000000	00000000000000000000000000000000	Test Activity 2	(blank)

- Business Unit: Enter Projects Business Unit. Click on the magnifying glass icon  to see a list of valid values.
- Project: Select the appropriate Project ID. Click on the magnifying glass icon  to see a list of valid values.
- Activity ID: Select the appropriate Activity ID. Click on the magnifying glass icon  to see a list of valid values.
- Description: Enter the appropriate Activity Description.
- Activity Type: Select the appropriate Activity Type. Click on the magnifying glass icon  to see a list of valid values.
- Select the appropriate Project / Activity to add the Resource.

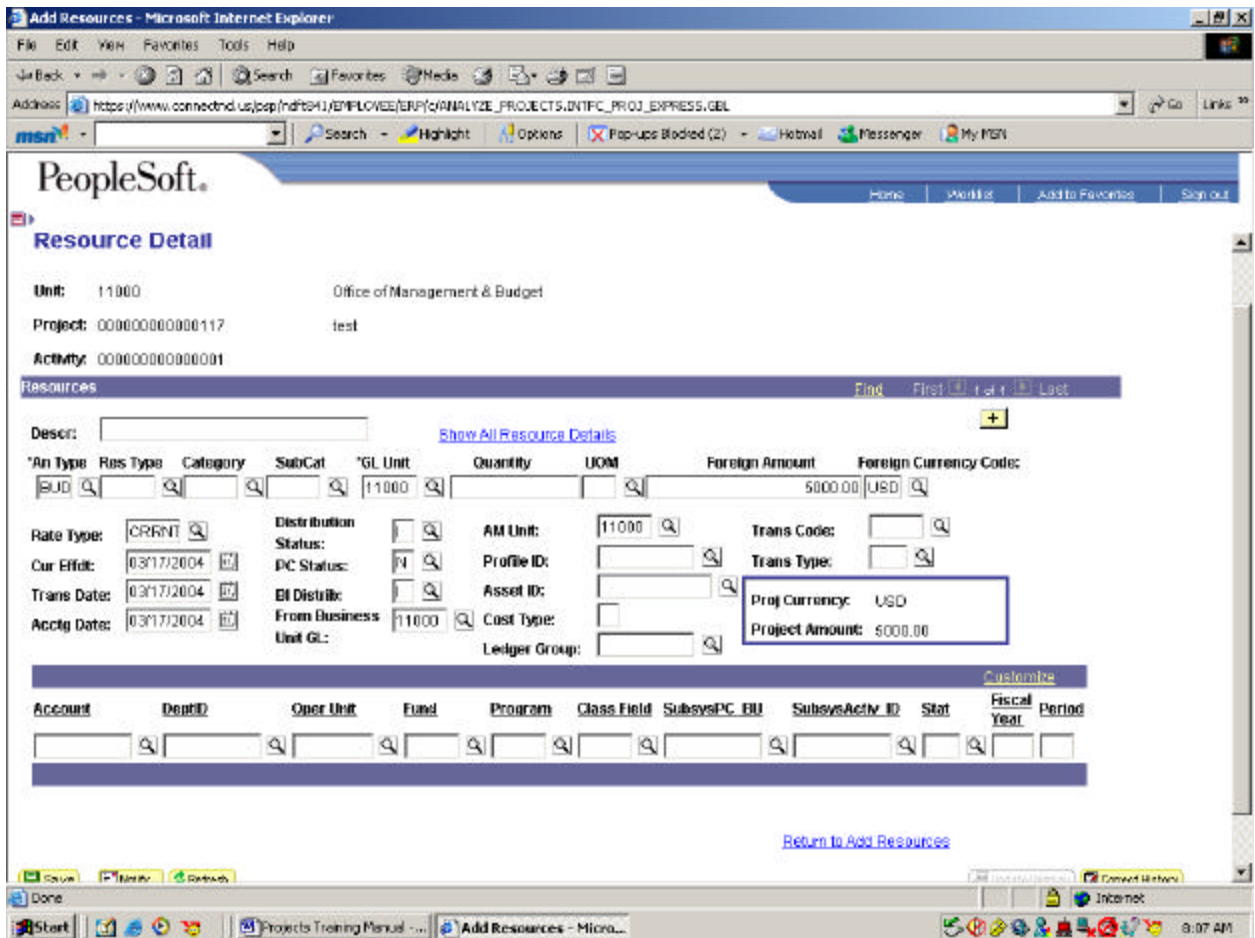


- Analysis Type: Enter the analysis type for the transaction you want to enter. Click on the magnifying glass icon  to see a list of valid values.
- If you want to enter multiple resources, Click the Add icon  to add additional rows of resources. There will be a prompt allowing you to input how many rows you would like to input. Follow above steps to fill out fields for the resource appropriately.
- Treat each row the same, however different Analysis Types can be used on each row.

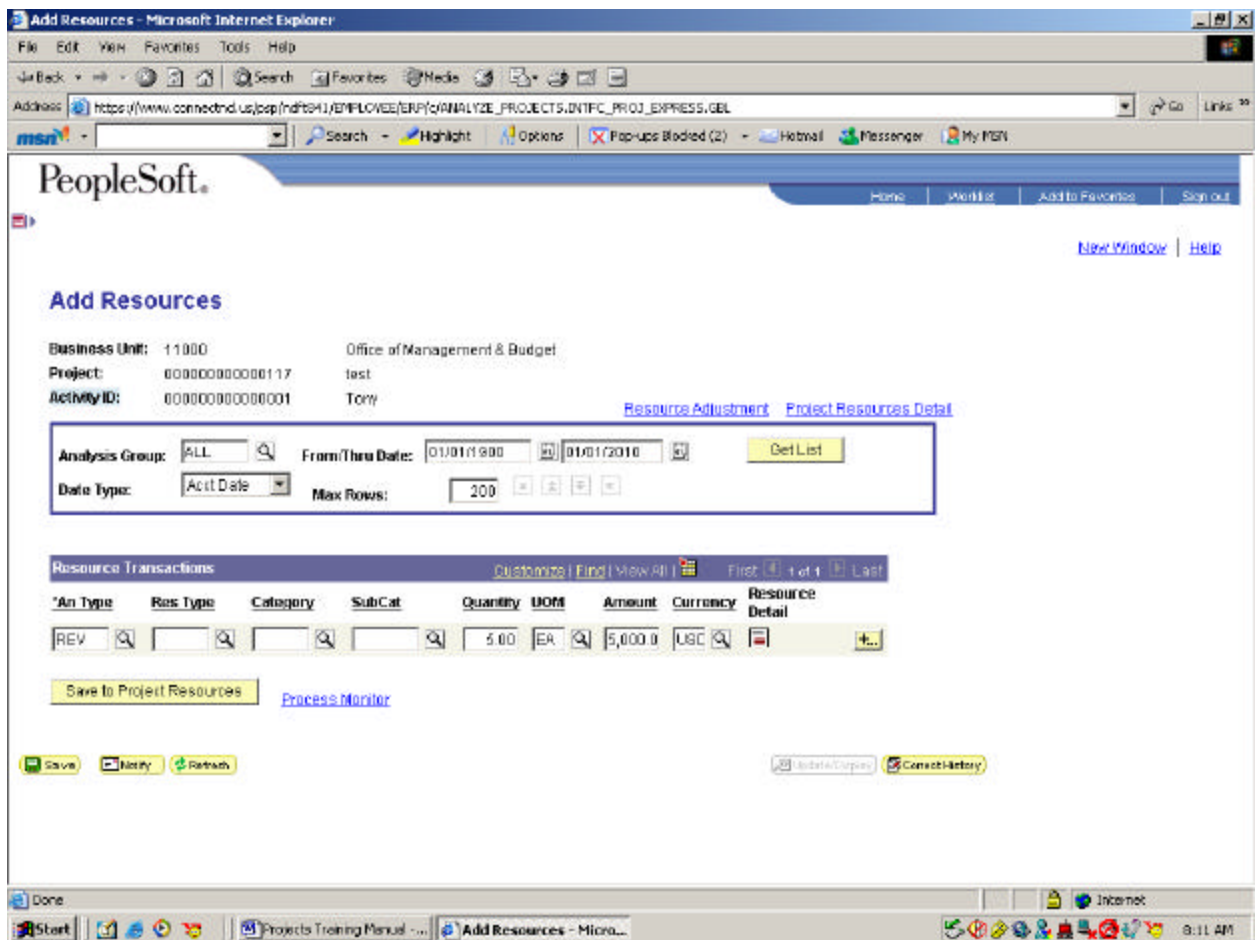


- Resource Type: Enter the appropriate Resource Type – if needed. Click on the magnifying glass icon  to see a list of valid values.
- Resource Category: Enter the appropriate Resource Type – if needed. Click on the magnifying glass icon  to see a list of valid values.
- Quantity: Enter the appropriate quantity – if needed.
- UOM: (Unit of Measure): Enter the appropriate UOM – if needed. Click on the magnifying glass icon  to see a list of valid values.
- Amount: Enter the valid dollar amount.
- Currency: USD

- Resource Detail: Click on the Resource Detail icon to add additional information about the Resource including Chartfield distribution (Account, Fund, DeptID, Operating Unit, Class, etc.) You can also change the accounting date for the transaction.



- Click on the [Return to Add Resource](#) hyperlink.



Add Resources

Business Unit: 11000 Office of Management & Budget
 Project: 00000000000117 test
 Activity ID: 00000000000001 Tony

[Resource Adjustment](#) [Project Resources Detail](#)

Analysis Group: ALL From/Thru Dates: 01/01/1900 01/01/2010 Get List
 Date Type: Act Date Max Rows: 200

Resource Transactions

An Type	Res Type	Category	SubCat	Quantity	UOM	Amount	Currency	Resource Detail
REV				5.00	EA	5,000.0	USD	

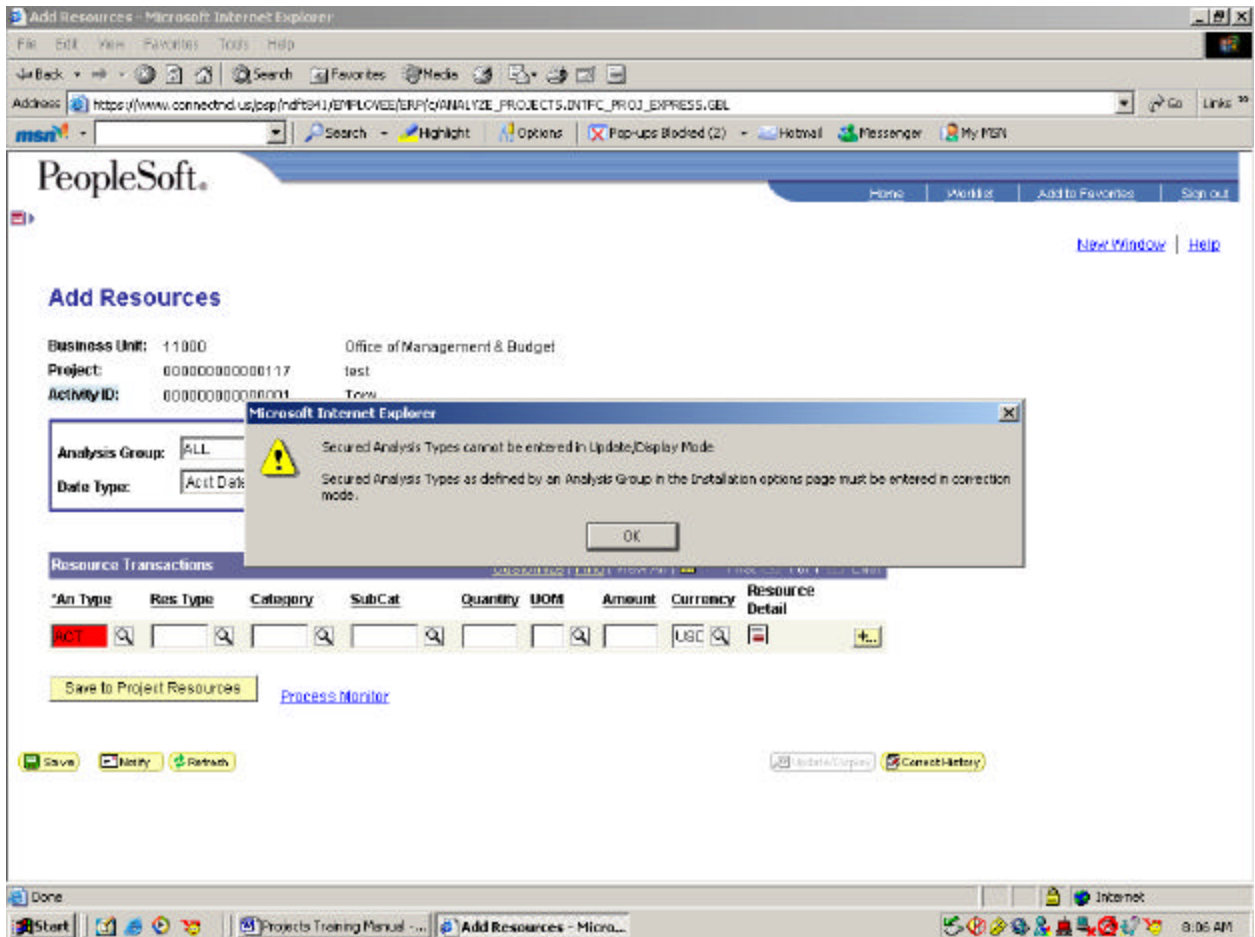
[Save to Project Resources](#) [Process Monitor](#)

Save Cancel Refresh Update History Connect History

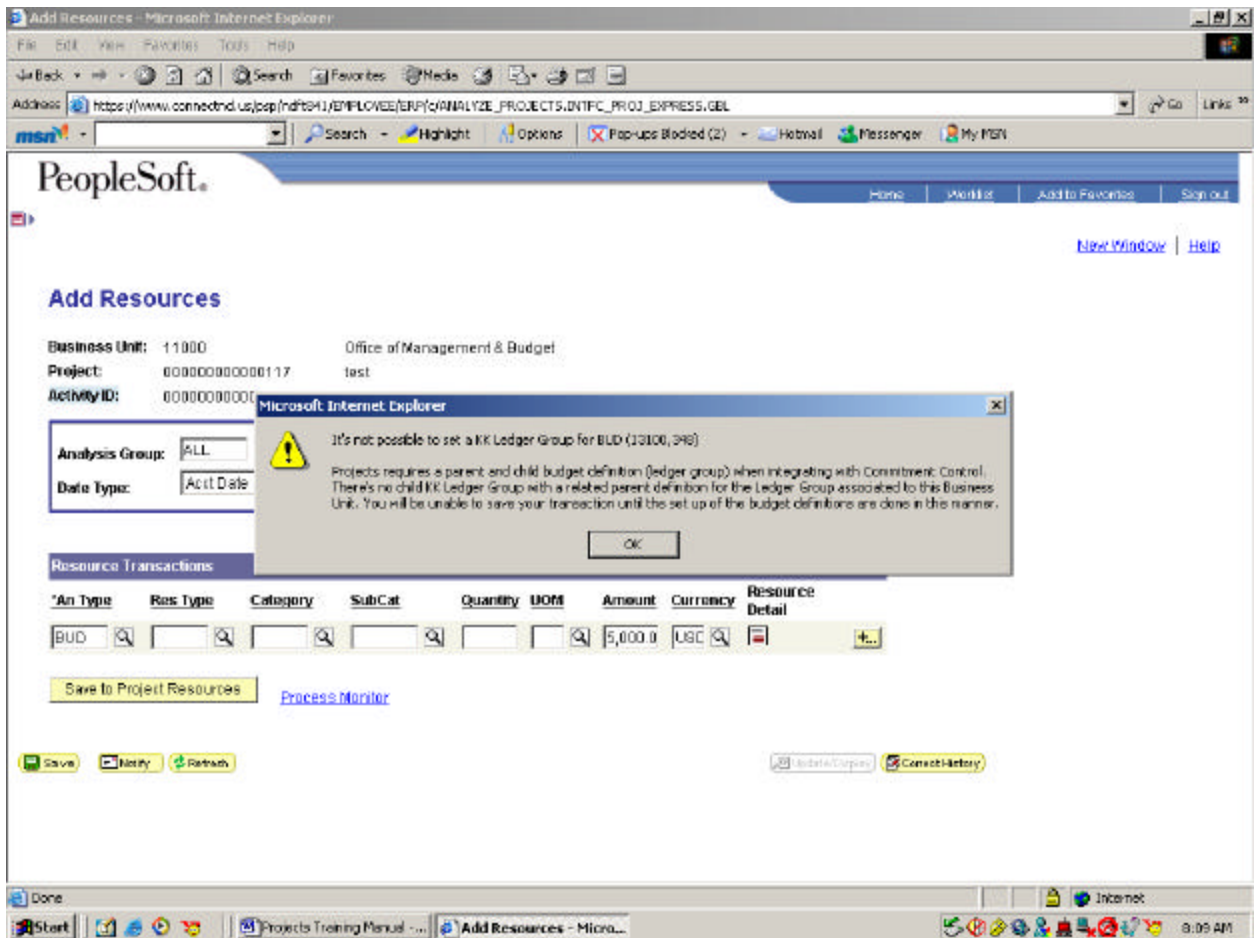
- Click **Save to Project Resources** before you click **Save**. If you do not, then the resource transaction will go to a staging table and you will need to run another process to finalize the transaction and send it to the PROJ_RESOURCE_TBL.

Note: You can navigate to the Process Monitor to view the status of the process, which was initiated when you clicked **Save to Project Resources**.

- 'ACT' is a secured analysis type and you must be in Correction mode to add it. You will receive an error message otherwise.



- You cannot add 'BUD' analysis type rows (budget) through this page due to commitment control. You will get an error message.

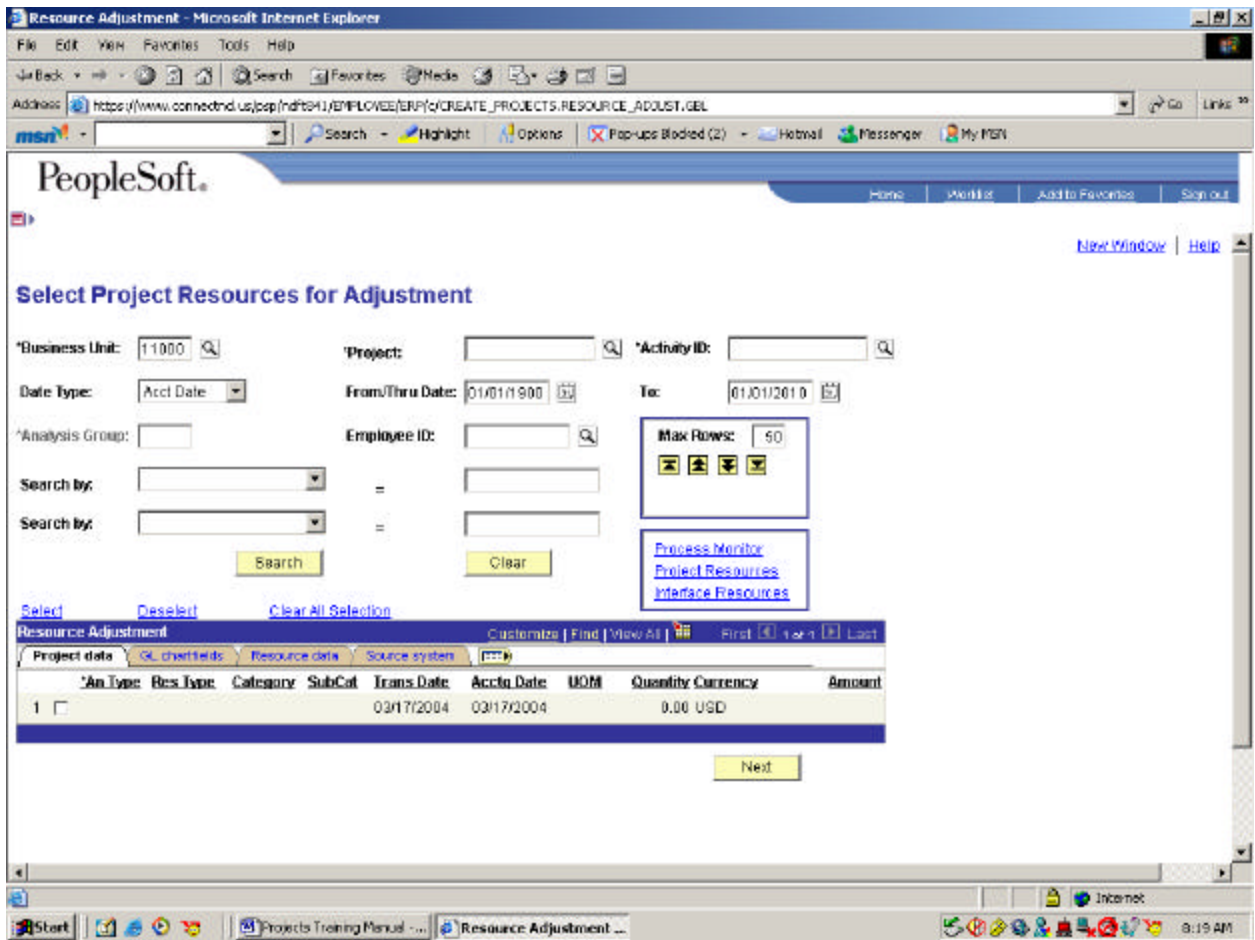


Adjusting Resource Transactions

- The Resource Adjustment function is used to make the following types of changes to resource rows:
- Corrections/changes to ChartField accounts for the value of the resource row, or a portion of the value of the resource row.
- Corrections/changes to the resource definition fields (i.e. Analysis Type, Resource Type, etc.)
- Adjustments to ChartFields create a reversing entry as well as a new entry, maintaining a complete audit trail of the transactions.
- Making resource adjustments is a "wizard" process that involves moving through several web pages.

Projects > Resources > Resource Adjustment

Note: Resources can be adjusted through either the Resources component, or through the Project General, Activities hyperlink



Select Project Resources for Adjustment

*Business Unit: 11000 *Project: *Activity ID:

Date Type: Acct Date From/Thru Dates: 01/01/1900 To: 01/01/2010

*Analysis Group: Employee ID:

Search by: =

Search by: =

Search Clear




Max Rows: 50

Process Monitor
Project Resources
Interface Resources

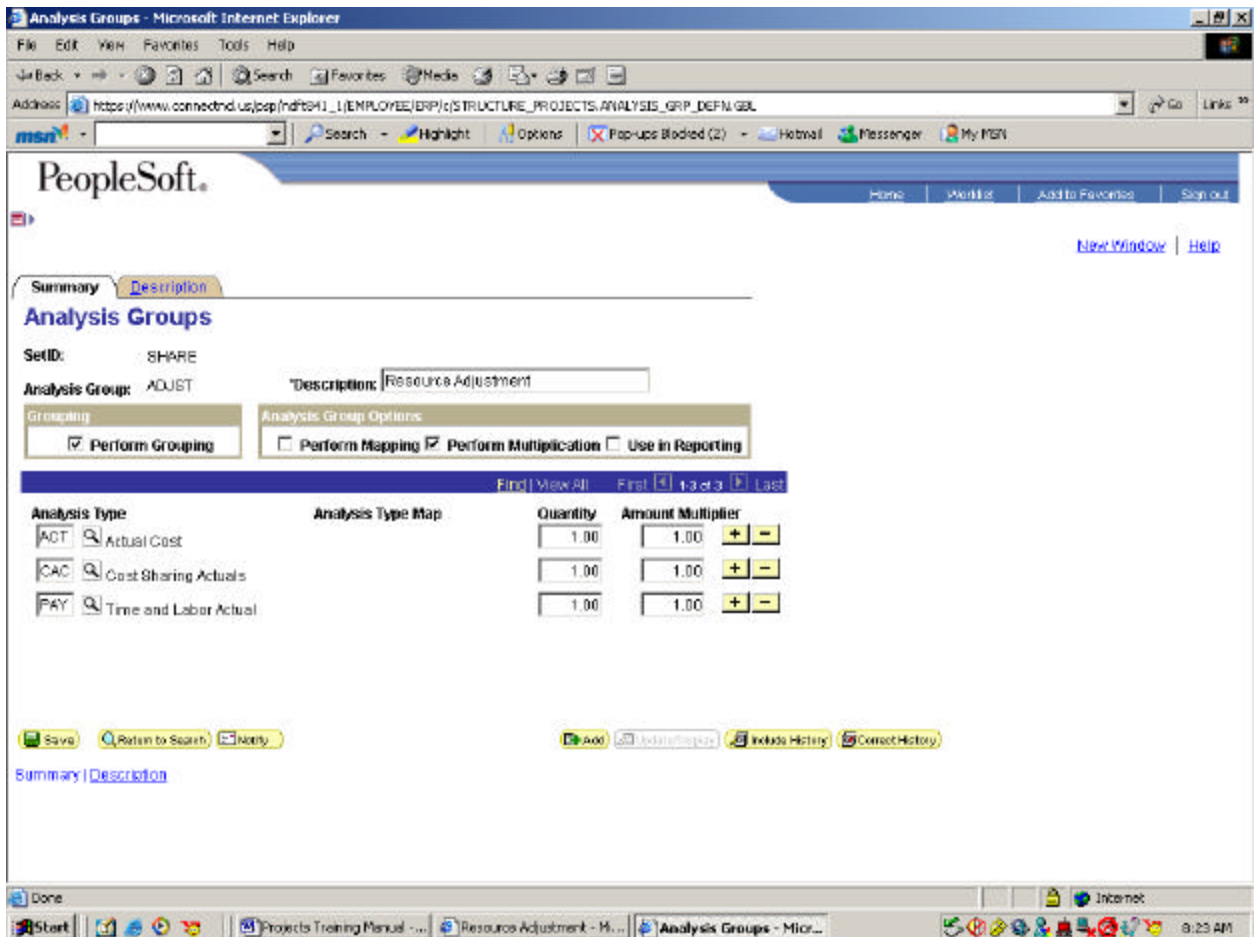
Select Deselect Clear All Selection

An Type	Res Type	Category	SubCat	Trans Date	Acct Date	UOM	Quantity	Currency	Amount
1				03/17/2004	03/17/2004			USD	

Next

- Business Unit: Enter Projects Business Unit. Click on the magnifying glass icon  to see a list of valid values.
- Project: Select the appropriate Project ID. Click on the magnifying glass icon  to see a list of valid values.
- Activity ID: Select the appropriate Activity ID. Click on the magnifying glass icon  to see a list of valid values.
- Date Type: Acct Date

- From / Thru Date: Will default from your user preferences, change if necessary.
- Analysis Group: ADJUST. Will default in. Only Analysis Types in this Analysis Group will be able to be adjusted.



Analysis Groups - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041_1/EMPLOYEE/ERP/c/S_STRUCTURE_PROJECTS_ANALYSIS_GRP_DEFN.GBL

msn Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My PSN

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New Window Help

Summary **Description**

Analysis Groups

SetID: SHARE

Analysis Group: ADJUST Description: Resource Adjustment

Grouping Analysis Group Options

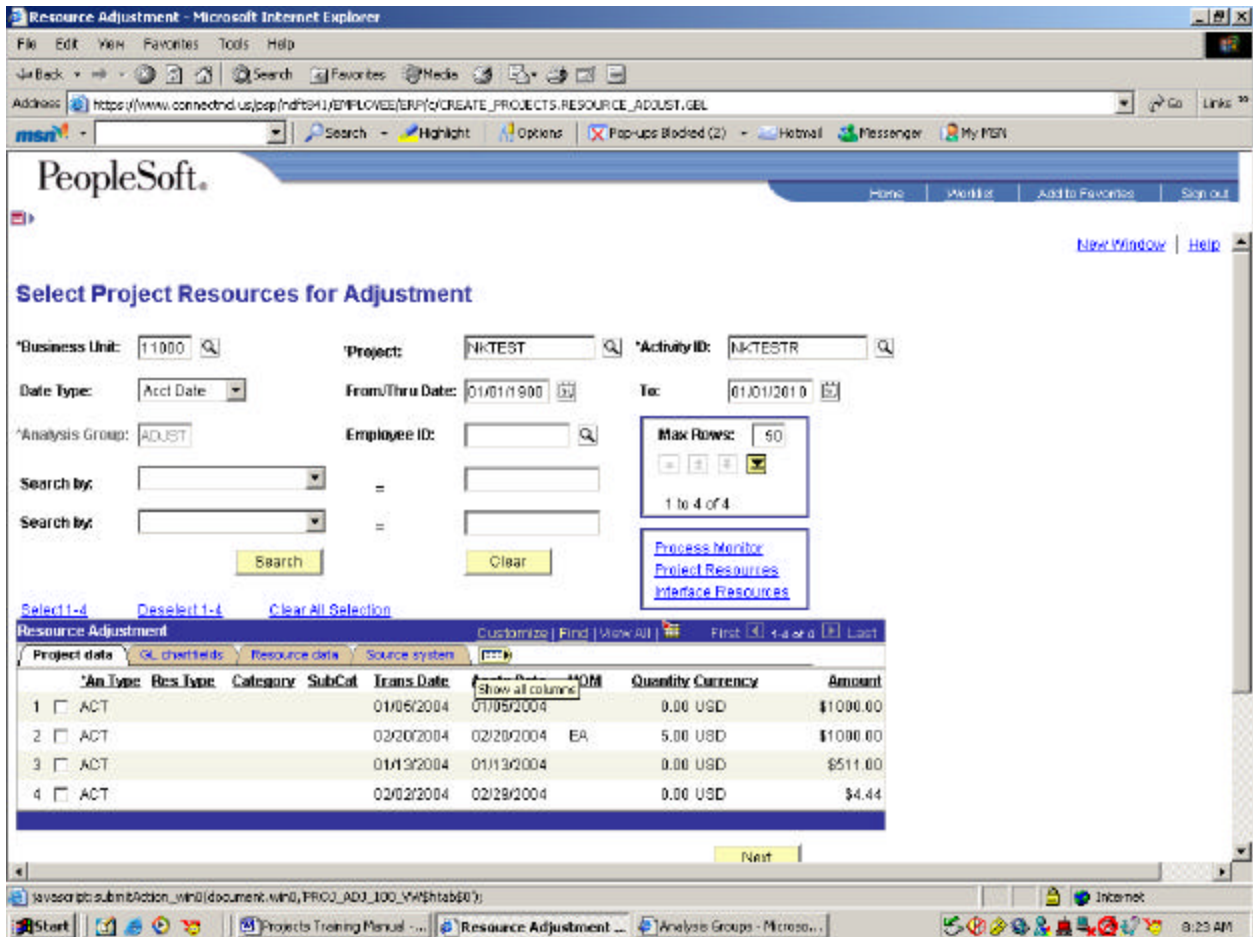
☒ Perform Grouping ☐ Perform Mapping ☒ Perform Multiplication ☐ Use in Reporting

Analysis Type	Analysis Type Map	Quantity	Amount Multiplier
ACT Actual Cost		1.00	1.00 + -
CAC Cost Sharing Actuals		1.00	1.00 + -
PAY Time and Labor Actual		1.00	1.00 + -

Save Return to Search Notify Add Delete/Reopen Include History Correct History

Summary Description

- Click **Search**



Select Project Resources for Adjustment

*Business Unit: 11000 *Project: NKTEST *Activity ID: NKTESTR

Date Type: Acct Date From/Thru Dates: 01/01/1900 To: 01/01/2010

*Analysis Group: ADJUST Employee ID: Max Rows: 50

Search by: Search by: 1 to 4 of 4

[Process Monitor](#) [Project Resources](#) [Interface Resources](#)

[Select 1-4](#) [Deselect 1-4](#) [Clear All Selection](#)

Project data	Chartfields	Resource data	Source system
*An Type	Res Type	Category	SubCat
1 ACT			
2 ACT			
3 ACT			
4 ACT			

Trans Date: 01/06/2004 01/05/2004 Quantity Currency Amount

0.00 USD \$1000.00

5.00 USD \$1000.00

0.00 USD \$511.00

0.00 USD \$4.44

[Next](#)

- Click [Clear](#) to enter the search criteria from the beginning.
- Check the transactions to be adjusted.
- If adjustments are being made only to ChartFields, multiple transactions can be selected and grouped together to automate the process, providing all transactions in the group have the same target account.
- To make adjustments to monetary or quantity values, select only one transaction.

Resource Adjustment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf0041/EMPLOYEE/EMP/q/CREATE_PROJECTS.RESOURCE_ADJUST.GBL

Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My PGN

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Home World Add to Favorites Sign out

New Window Help

Select Project Resources for Adjustment

*Business Unit: 11000 *Project: NKTEST *Activity ID: NKTESTR

Date Type: Acct Date From/Thru Dates: 01/01/1900 To: 01/01/2010

*Analysis Group: ADJUST Employee ID:

Search by: Search by:

Search Clear

Max Rows: 50
1 to 4 of 4

[Process Monitor](#)
[Project Resources](#)
[Interface Resources](#)

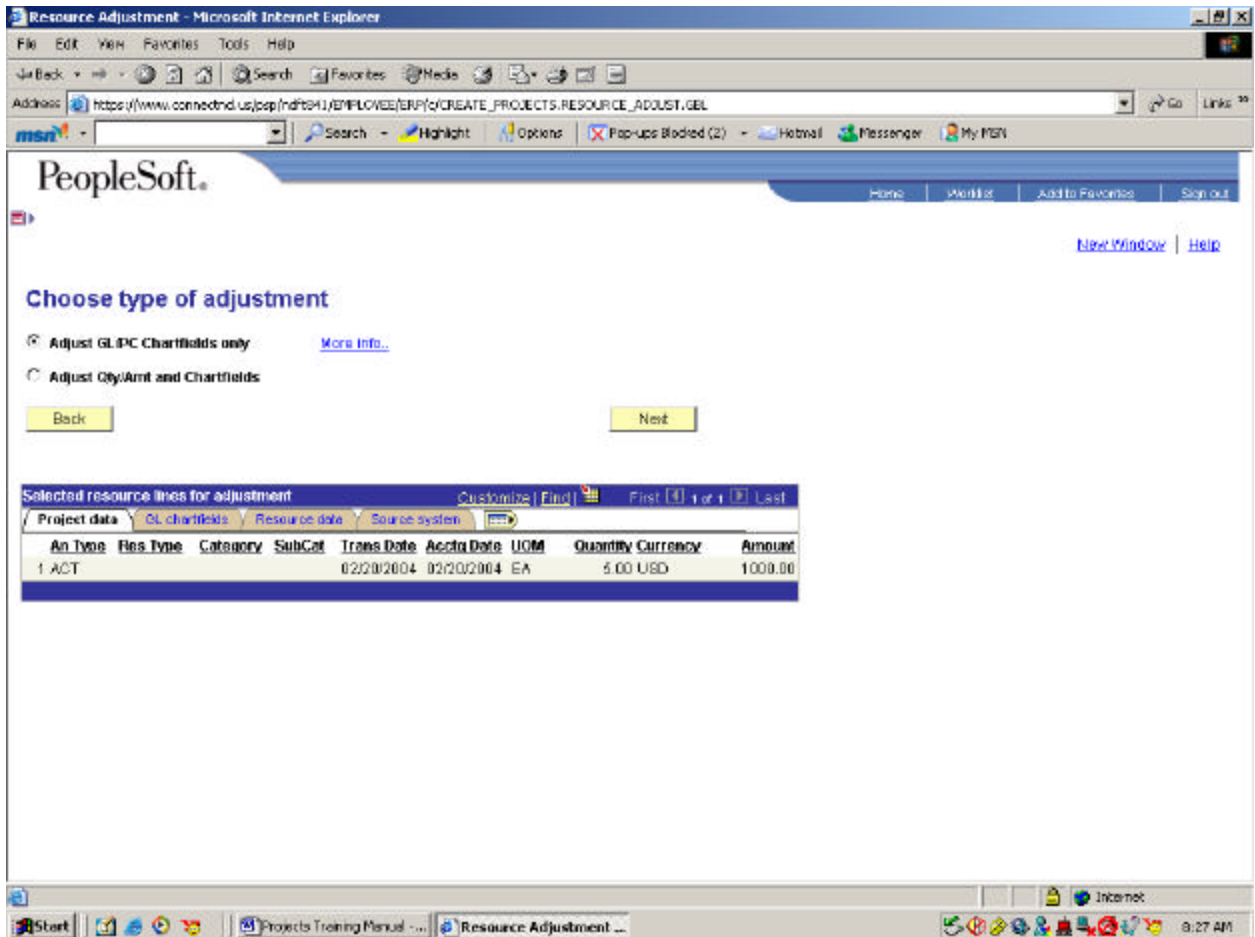
Select 1-4 Deselect 1-4 Clear All Selection

Resource Adjustment										
Customize Find View All First 4 of 4 Last										
Project data GL chartfields Resource data Source system										
	*An Type	Res Type	Category	SubCat	Trans Date	Acctg Date	UOM	Quantity	Currency	Amount
1	<input type="checkbox"/>	ACT			01/06/2004	01/05/2004		0.00	USD	\$1000.00
2	<input checked="" type="checkbox"/>	ACT			02/20/2004	02/20/2004	EA	5.00	USD	\$1000.00
3	<input type="checkbox"/>	ACT			01/13/2004	01/13/2004		0.00	USD	\$511.00
4	<input type="checkbox"/>	ACT			02/02/2004	02/29/2004		0.00	USD	\$4.44

Next

Start Projects Training Man... Resource Adjustm... Analysis Groups - Mic... 9:25 AM

- Click **Next**.
- Choose the type of adjustment to be made to the resource transactions.



Resource Adjustment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS_RESOURCE_ADJUST.GBL

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[New Window](#) [Help](#)

Choose type of adjustment

☒ Adjust GL/PIC Chartfields only [More info..](#)

☐ Adjust Qty/Amt and Charfields

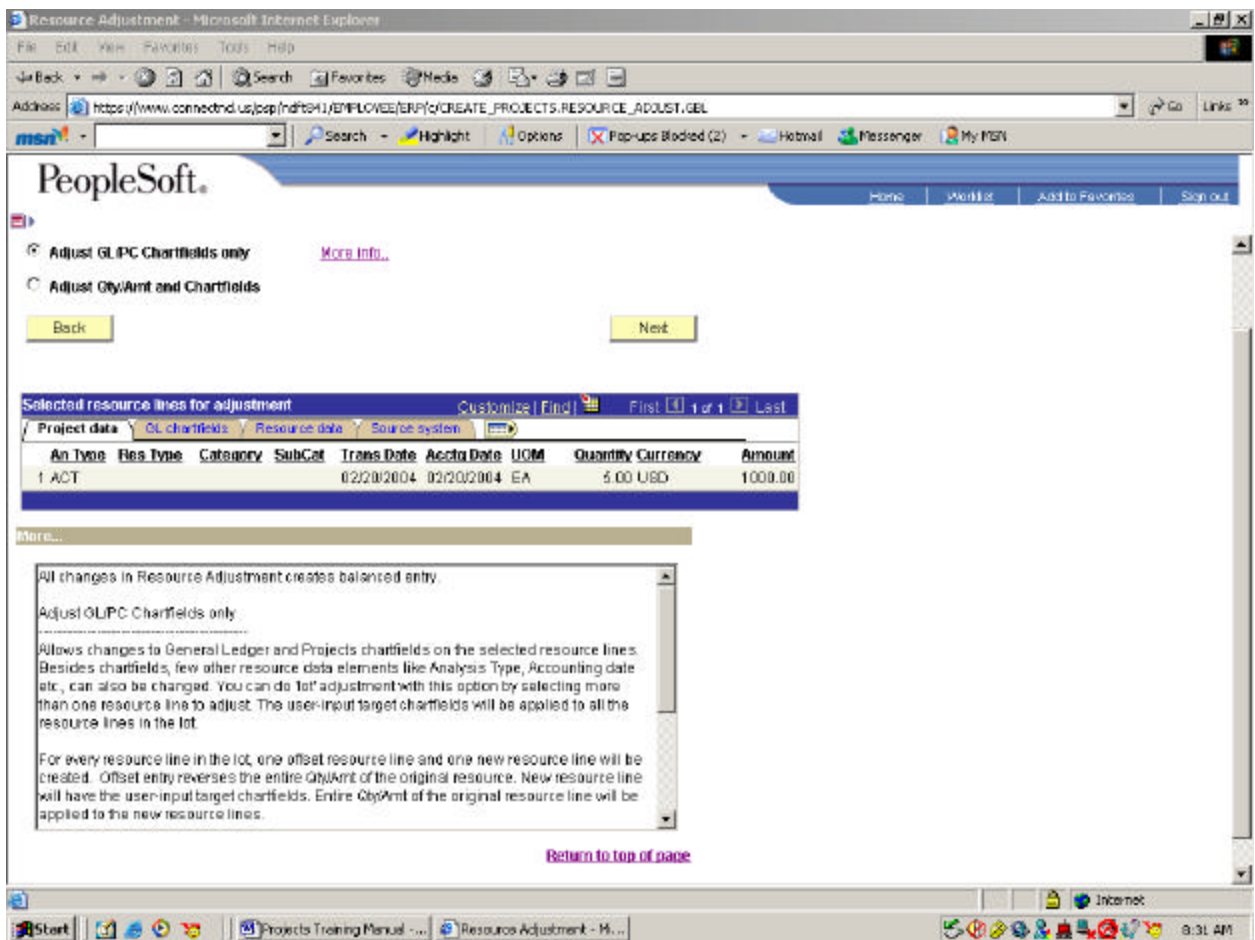
[Back](#) [Next](#)

Selected resource lines for adjustment

Project data GL chartfields Resource data Source system

An Type	Bus Type	Category	SubCat	Trans Date	Acctg Date	UOM	Quantity	Currency	Amount
1 ACT				02/20/2004	02/20/2004	EA	5.00	USD	1000.00

- To view further information on the types of adjustments, click the [More info](#) link to open a Help window.



Adjust GL/PC Chartfields only

Allows changes to General Ledger and Projects chartfields on the selected resource lines. Besides chartfields, few other resource data elements like Analysis Type, Accounting date etc., can also be changed. You can do 'lot' adjustment with this option by selecting more than one resource line to adjust. The user-input target chartfields will be applied to all the resource lines in the lot.

For every resource line in the lot, one offset resource line and one new resource line will be created. Offset entry reverses the entire Qty/Amt of the original resource. New resource line will have the user-input target chartfields. Entire Qty/Amt of the original resource line will be applied to the new resource lines.

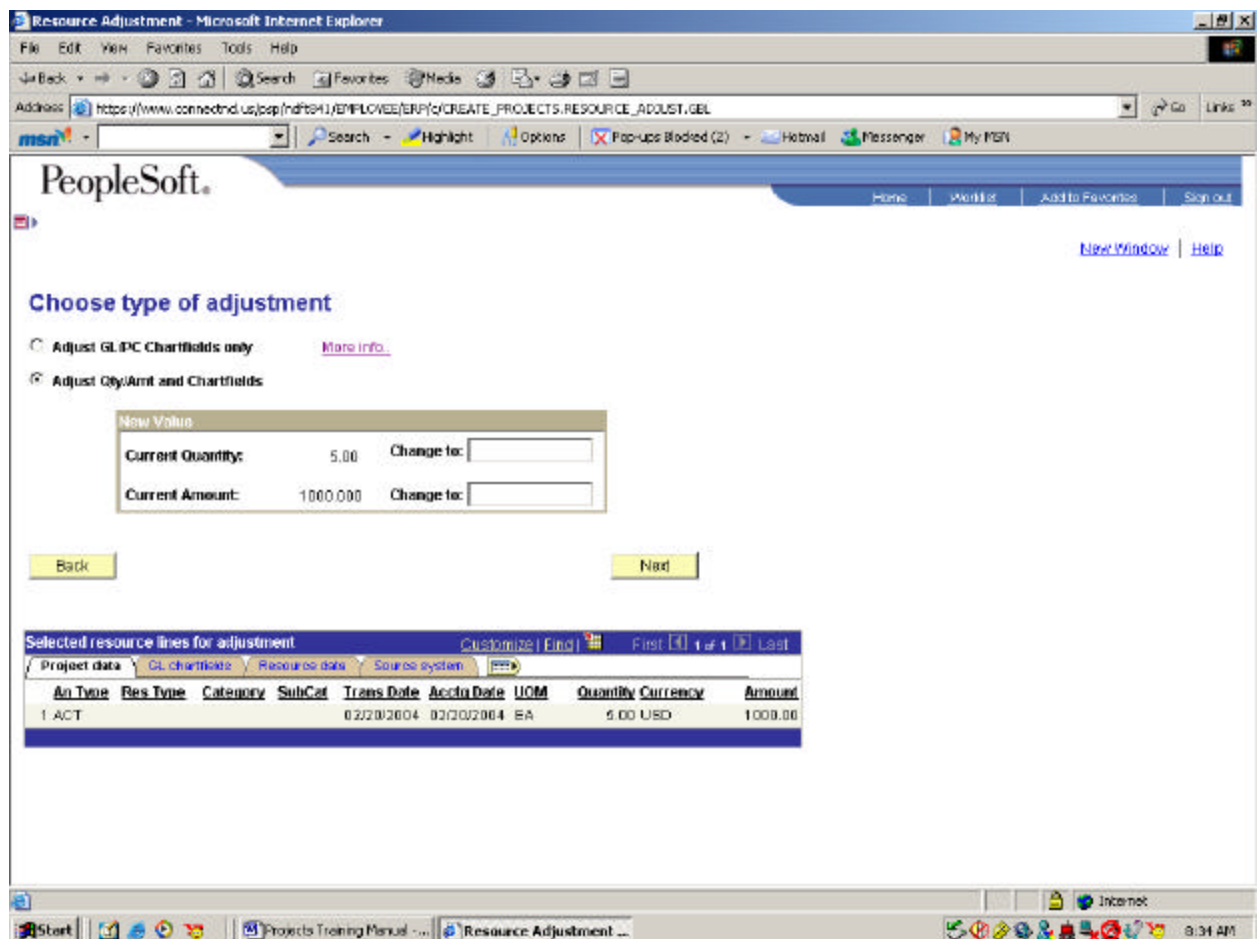
Adjust Qty/Amt and Chartfields

Allows changes to GL/PC chartfields (and few other resource data elements like Analysis Type, Accounting Date) and Quantity/Amount. This option allows adjustments to one resource line at a time.

Creates one offset resource line, reversing only by the user-input Qty/Amt. If a partial adjustment to Qty/Amt is made, the balance Qty/Amt will be assigned to the user-input target chartfields. Besides the offset, one new resource line will be created with the user-input target chartfields and the balance Qty/Amt.

To adjust resource transactions of Quantity/Amount and ChartFields

- Select Adjust Qty/Amt and ChartFields.



Resource Adjustment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/EMP/c/CREATE_PROJECTS.RESOURCE_ADJUST.GEL

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[New Window](#) [Help](#)

Choose type of adjustment

☐ Adjust GL/PC Chartfields only [More Info...](#)

☒ Adjust Qty/Amt and Chartfields

New Value

Current Quantity: 5.00 Change to:

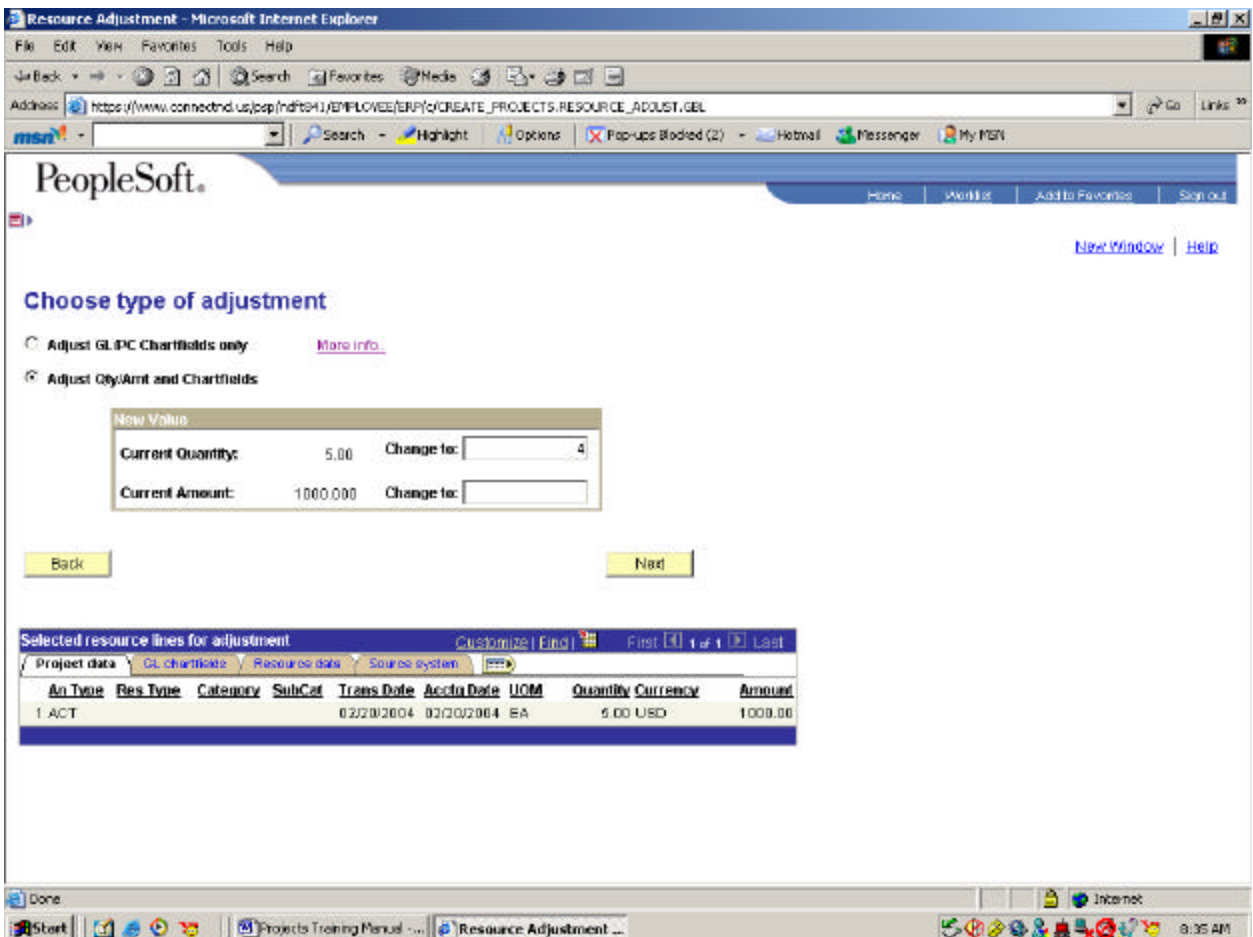
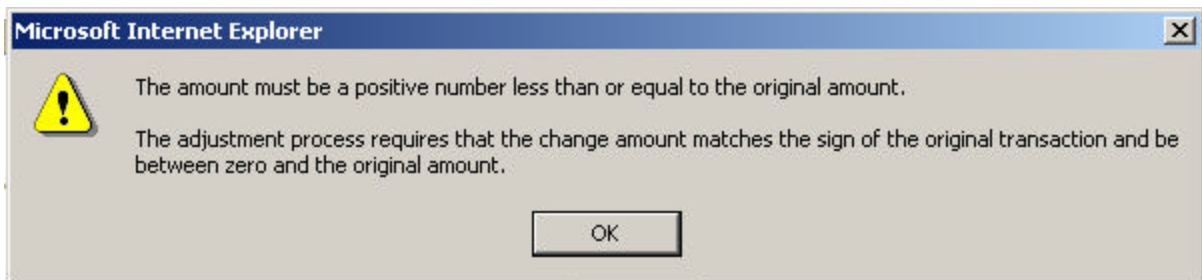
Current Amount: 1000.00 Change to:

Selected resource lines for adjustment [Customize](#) [Find](#) First [4] 1 of 1 [8] Last

An Type	Res Type	Category	SubCat	Trans Date	Acctn Date	UOM	Quantity	Currency	Amount
1	ACT			02/20/2004	02/20/2004	EA	5.00	USD	1000.00

Start Projects Training Manual Resource Adjustment 9:34 AM

- Change the quantity or amount by entering it into the New Value box.



- Click .

Resource Adjustment - Microsoft Internet Explorer

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS.RESOURCE_ADJUST.GBL

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Select target chartfields

Unit: 11000 Project: NKTEST Activity ID: NKTESTR

New resource lines

Unit	Project	Activity ID	Res Type	Category	SubCat	An Type	UOM
11000	NKTEST	NKTESTR					

Trans Date	Acctg Date	Asset ID	GL Unit	GL Status	Quantity	Transaction Amount
03/17/2004	03/17/2004			Ignored	1.00	0.00

GL chartfields [More Chartfields](#)

Account	Oper Unit	Fund	DeptID	Program	Class

Back Finish

Selected resource lines for adjustment

Project date	GL chartfields	Resource data	Source system
02/20/2004			

An Type	Res Type	Category	SubCat	Trans Date	Accto Date	UOM	Quantity	Currency	Amount
1 ACT				02/20/2004	02/20/2004	EA	5.00	USD	1000.00

- Under the section entitled New resource lines, enter a new Project and Activity.

Resource Adjustment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf041/EMPLOYEE/EMP/q/CREATE_PROJECTS.RESOURCE_ADJUST.GBL

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New Window Help

Select target chartfields

Unit: 11000 Project: NKTEST Activity ID: NKTESTR

New resource lines

Unit	Project	Activity ID	Res Type	Category	SubCat	An Type	UOM
11000	ITCDemo	STEVE					

Trans Date	Acctg Date	Asset ID	GL Unit	GL Status	Quantity	Transaction Amount
03/17/2004	03/17/2004		11000	Ignored	1.00	0.00

GL chartfields [More Chartfields](#)

Account	Oper Unit	Fund	DeptID	Program	Class

Back Finish

Selected resource lines for adjustment Customize | End | View All | First | Next | Last

Project data GL chartfields Resource data Source system

An Type	Res Type	Category	SubCat	Trans Date	Accto Date	UOM	Quantity	Currency	Amount
1 ACT				02/20/2004	02/20/2004	EA	5.00	USD	1000.00

- Under the New Resource Lines section, enter info on the [GL ChartFields](#) tab.
- Change one or more chartfields in the resource line.
- You must enter a value in the GL Account field.
- If left blank on the New Resource Line, all other fields will retain their original values (displayed at the bottom of the page).

Resource Adjustment - Microsoft Internet Explorer

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS.RESOURCE_ADJUST.GBL

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Home World of Add to Favorites Sign out

New Window Help

Select target chartfields

Unit: 11000 Project: NKTEST Activity ID: NKTEST

New resource lines

Unit	Project	Activity ID	Res Type	Category	SubCat	An Type	UOM
11000	ITDEMO	STEVE					

Trans Date	Acctg Date	Asset ID	GL Unit	GL Status	Quantity	Transaction Amount
03/17/2004	03/17/2004		11000	Ignored	1.00	0.00

GL chartfields [More Chartfields](#)

Account	Oper Unit	Fund	DeptID	Program	Class
611070	110	000			

Back Finish

Selected resource lines for adjustment Customize | End | View All | First | Next | Last

Project date	GL chartfields	Resource data	Source system	Item					
An Type	Res Type	Category	SubCat	Trans Date	Accto Date	UOM	Quantity	Currency	Amount
1 ACT				02/20/2004	02/20/2004	EA	5.00	USD	1000.00

- Click **Finish**.

Resource Adjustment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf0241/EMPLOYEE/EMP/cr/CREATE_PROJECTS.RESOURCE_ADJUST.GBL

Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My PSN

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[New Window](#) [Help](#)

Finalize adjustment

Original resource lines Find | View All First 1 of 1 Last

*Unit	*Project	Activity	ResourceID
11000	NKTEST	NKTESTR	10008926

*An Type	Res Type	Category	SubCat	GL Unit	Trans Date	Acctg Date	Description
ACT				11000	02/20/2004	02/20/2004	

UOM	Quantity	Trans Curr	Transaction Amount	Resource Amount	GL Status
EA	5.00	USD	1000.00	1000.00	

GL chartfields [More Chartfields](#)

Account	Open Unit	Fund	DeptID	Program	Class
101 001	070	000	0905		

Offset resource lines Find | View All First 1 of 1 Last

*Unit	*Project	Activity	ResourceID
11000	NKTEST	NKTESTR	10008926

*An Type	Res Type	Category	SubCat	GL Unit	Trans Date	Acctg Date	Description
ACT				11000	02/20/2004	03/17/2004	

UOM	Quantity	Trans Curr	Transaction Amount	Resource Amount	GL Status
EA	-1.00	USD	0.00	0.00	

Done

Start Projects Training Manual ... Resource Adjustment ... Jentified - Print

Internet 9:05 AM

Resource Adjustment - Microsoft Internet Explorer

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS_RESOURCE_ADJUST.GBL

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Home World of Add to Favorites Sign out

UOM: EA Quantity: -1.00 Trans Curr: USD Transaction Amount: 0.00 Resource Amount: 0.00 GL Status: ☐

GL chartfields: More Chartfields

Account	Over Unit	Fund	DeptID	Program	Class
101001	070	000	0905		

Now resource lines Find | View All First | < > | Last

*Unit: 11000 *Project: ITDDEMO *Activity ID: STEVE ResourceID: 10009920

An Type: ACT Res Type: Category: SubCat: GL Unit: 11000 Trans Date: 03/17/2004 Acctg Date: 03/17/2004 Description:

UOM: EA Quantity: 1.00 Trans Curr: USD Transaction Amount: 0.00 Base Currency: USD Resource Amount: 0.00 GL Status: ☐

Sys Source: BI Distrib: PC Status: PPC: ☐ BI Distrib: ☐ PC Status: ☐

GL chartfields: More Chartfields

Account	Over Unit	Fund	DeptID	Program	Class
611070	110	000	0906		

Back OK, Next Adjustment Cancel this adjustment Save

- Review the adjustments on the Finalize Adjustment page.
- **Back** : At any point, click the Back button to return to the previous page.
- **OK, Next Adjustment** : To accept the changes and return to the Select Project Resources for Adjustment page.

Resource Adjustment - Microsoft Internet Explorer

Address: https://www.connectnd.us/bep/ndf0341/EMPLOYEE/EMP/q/CREATE_PROJECTS.RESOURCE_ADJUST.GBL

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Select Project Resources for Adjustment

*Business Unit: 11000 *Project: NIKTEST *Activity ID: NIKTESTR

Date Type: Acct Date From/Thru Date: 01/01/1900 To: 01/01/2010

*Analysis Group: ADJUST Employee ID: []

Search by: [] Search by: []

Max Rows: 50 1 to 4 of 4

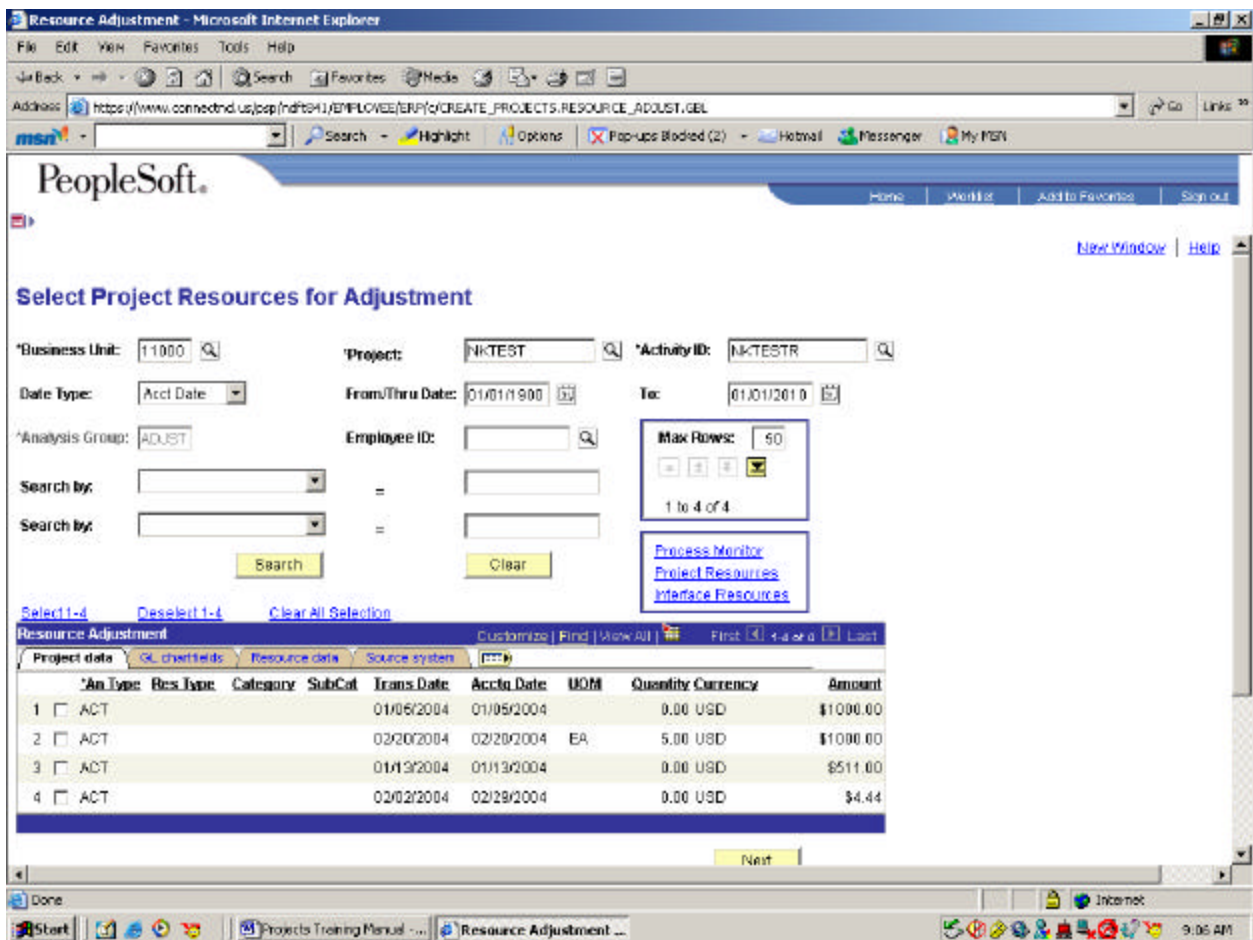
Process Monitor Project Resources Interface Resources

Select 1-4 Deselect 1-4 Clear All Selection

Project data	GL chartfields	Resource data	Source system	Trans Date	Acctg Date	UOM	Quantity	Currency	Amount
1	ACT			01/05/2004	01/05/2004		0.00	USD	\$1000.00
2	ACT			02/20/2004	02/20/2004	EA	5.00	USD	\$1000.00
3	ACT			01/13/2004	01/13/2004		0.00	USD	\$511.00
4	ACT			02/02/2004	02/29/2004		0.00	USD	\$4.44

Save Next

- Cancel this adjustment**: To reject the changes and return to the Select Project Resources for Adjustment page.



Select Project Resources for Adjustment

*Business Unit: 11000 *Project: NKTEST *Activity ID: NKTESTR

Date Type: Acct Date From/Thru Dates: 01/01/1900 To: 01/01/2010

*Analysis Group: ADJUST Employee ID: Max Rows: 50

Search by: Search Clear

Select 1-4 Deselect 1-4 Clear All Selection

Project data	GL chartfields	Resource data	Source system						
*An Type	Res Type	Category	SubCat	Trans Date	Acctn Date	UOM	Quantity	Currency	Amount
1 <input type="checkbox"/> ACT				01/06/2004	01/05/2004		0.00	USD	\$1000.00
2 <input type="checkbox"/> ACT				02/20/2004	02/20/2004	EA	5.00	USD	\$1000.00
3 <input type="checkbox"/> ACT				01/13/2004	01/13/2004		0.00	USD	\$511.00
4 <input type="checkbox"/> ACT				02/02/2004	02/29/2004		0.00	USD	\$4.44

Next

- You must click **Save** on either the Finalize Adjustment page or the Select Project Resources for Adjustment page to save the changes to the database.
- Upon saving, adjustments to monetary values will be budget checked if Commitment Control is active.

To Adjust Resource Transactions for GL/PC ChartFields Only

Resource Adjustment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bep/ndf0041/EMPLOYEE/EMP/q/CREATE_PROJECTS.RESOURCE_ADJUST.GBL

Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My PSN

PeopleSoft® Home World Add to Favorites Sign out

New Window Help

Choose type of adjustment

☒ Adjust GL/PC ChartFields only [More Info..](#)

☐ Adjust Qty/Amnt and ChartFields

Back Next

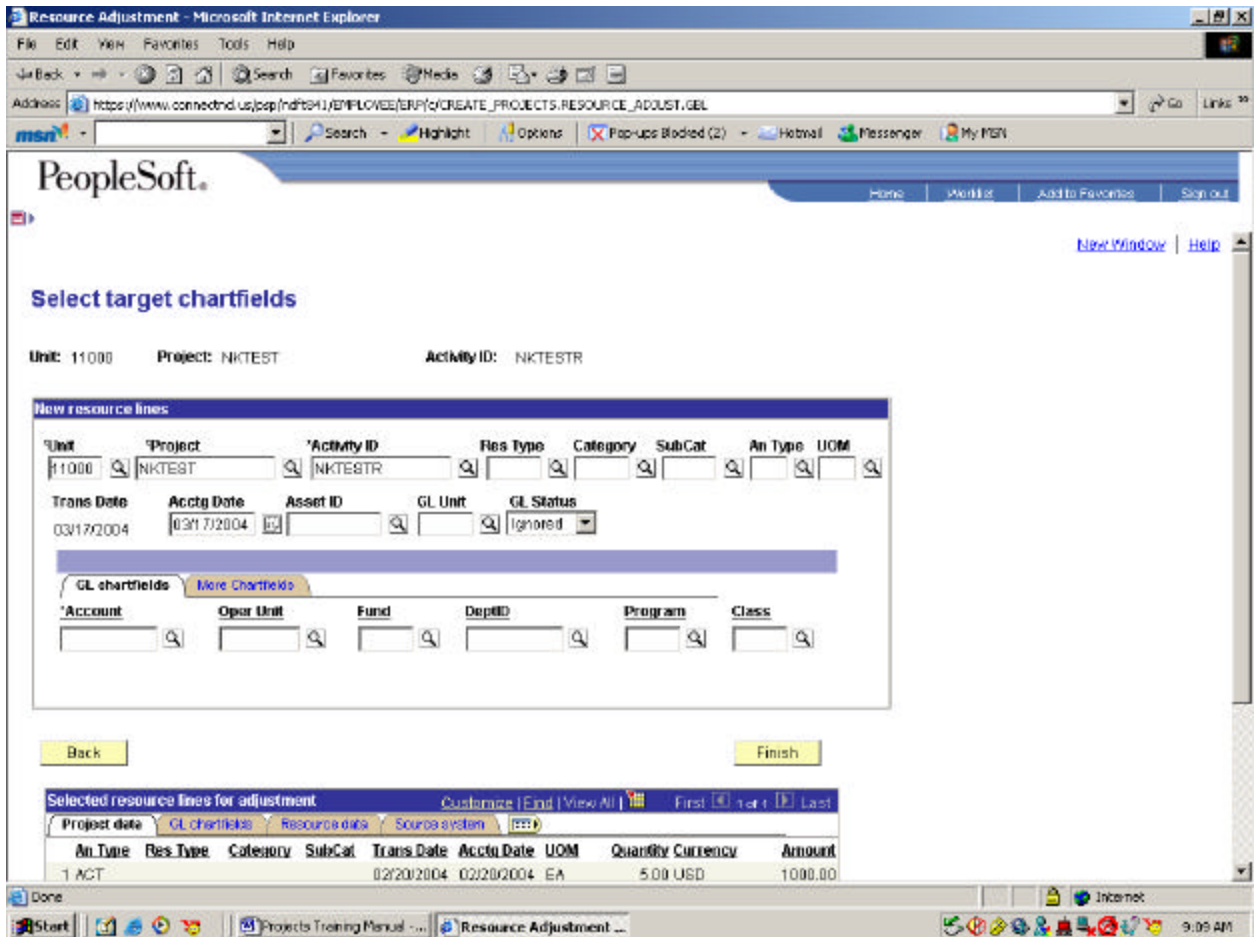
Selected resource lines for adjustment Customize Find First [1] of 1 [2] Last

Project data	GL chartfields	Resource data	Source system	
An Type	Res Type	Category	SubCat	Trans Date Acctg Date UOM Quantity Currency Amount
1 ACT				02/20/2004 02/20/2004 EA 5.00 USD 1000.00

Start Projects Training Manual Resource Adjustment 9:06 AM

- From the Choose Type of Adjustment page, select Adjust GL/PC ChartFields only.

- Click .



Resource Adjustment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS.RESOURCE_ADJUST.GBL

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New Window Help

Select target chartfields

Unit: 11000 Project: NKTEST Activity ID: NKTESTR

New resource lines

Unit Project Activity ID Res Type Category SubCat An Type UOM

11000 NKTEST NKTESTR

Trans Date Acctg Date Asset ID GL Unit GL Status

03/17/2004 03/17/2004 Ignored

GL chartfields More Chartfields

Account Oper Unit Fund DeptID Program Class

Back Finish

Selected resource lines for adjustment

Customize | End | View All | First | Next | Last

Project date GL chartfields Resource data Source system

An Type	Res Type	Category	SubCat	Trans Date	Accto Date	UOM	Quantity	Currency	Amount
1 ACT				02/20/2004	02/20/2004	EA	5.00	USD	1000.00

- Under the New Resource Lines section, enter info on the [GL ChartFields](#) tab.
- Change one or more chartfields in the resource line.
- You must enter a value in the GL Account field.
- If left blank on the New Resource Line, all other fields will retain their original values (displayed at the bottom of the page).

Resource Adjustment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/EMP/q/CREATE_PROJECTS.RESOURCE_ADJUST.GBL

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[New Window](#) [Help](#)

Select target chartfields

Unit: 11000 Project: NKTEST Activity ID: NKTESTR

New resource lines

Unit	Project	Activity ID	Res Type	Category	SubCat	An Type	UOM
11000	NKTEST	NKTESTR					

Trans Date: 03/17/2004 Acctg Date: 03/17/2004 Asset ID: GL Unit: 11000 GL Status: Ignored

GL chartfields [More Chartfields](#)

Account	Oper Unit	Fund	DeptID	Program	Class
632020					

[Back](#) [Finish](#)

Selected resource lines for adjustment [Customize](#) | [End](#) | [View All](#) | [First](#) | [Next](#) | [Last](#)

[Project data](#) [GL chartfields](#) [Resource data](#) [Source system](#) [\[...\]](#)

An Type	Res Type	Category	SubCat	Trans Date	Accto Date	UOM	Quantity	Currency	Amount
1 ACT				02/20/2004	02/20/2004	EA	5.00	USD	1000.00

Start | Projects Training Manual | Resource Adjustment | 9:11 AM

- Click [Finish](#).

Resource Adjustment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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[New Window](#) [Help](#)

Finalize adjustment

Original resource lines Find | View All First 1 of 1 Last

*Unit	*Project	Activity	ResourceID
11000	NKTEST	NKTESTR	10008926

*An Type	Res Type	Category	SubCat	GL Unit	Trans Date	Acctg Date	Description
ACT				11000	02/20/2004	02/20/2004	

UOM	Quantity	Trans Curr	Transaction Amount	Resource Amount	GL Status
EA	5.00	USD	1000.00	1000.00	

GL chartfields [More Chartfields](#)

Account	Open Unit	Fund	DeptID	Program	Class
101 001	070	000	0905		

Offset resource lines Find | View All First 1 of 1 Last

*Unit	*Project	Activity	ResourceID
11000	NKTEST	NKTESTR	10008926

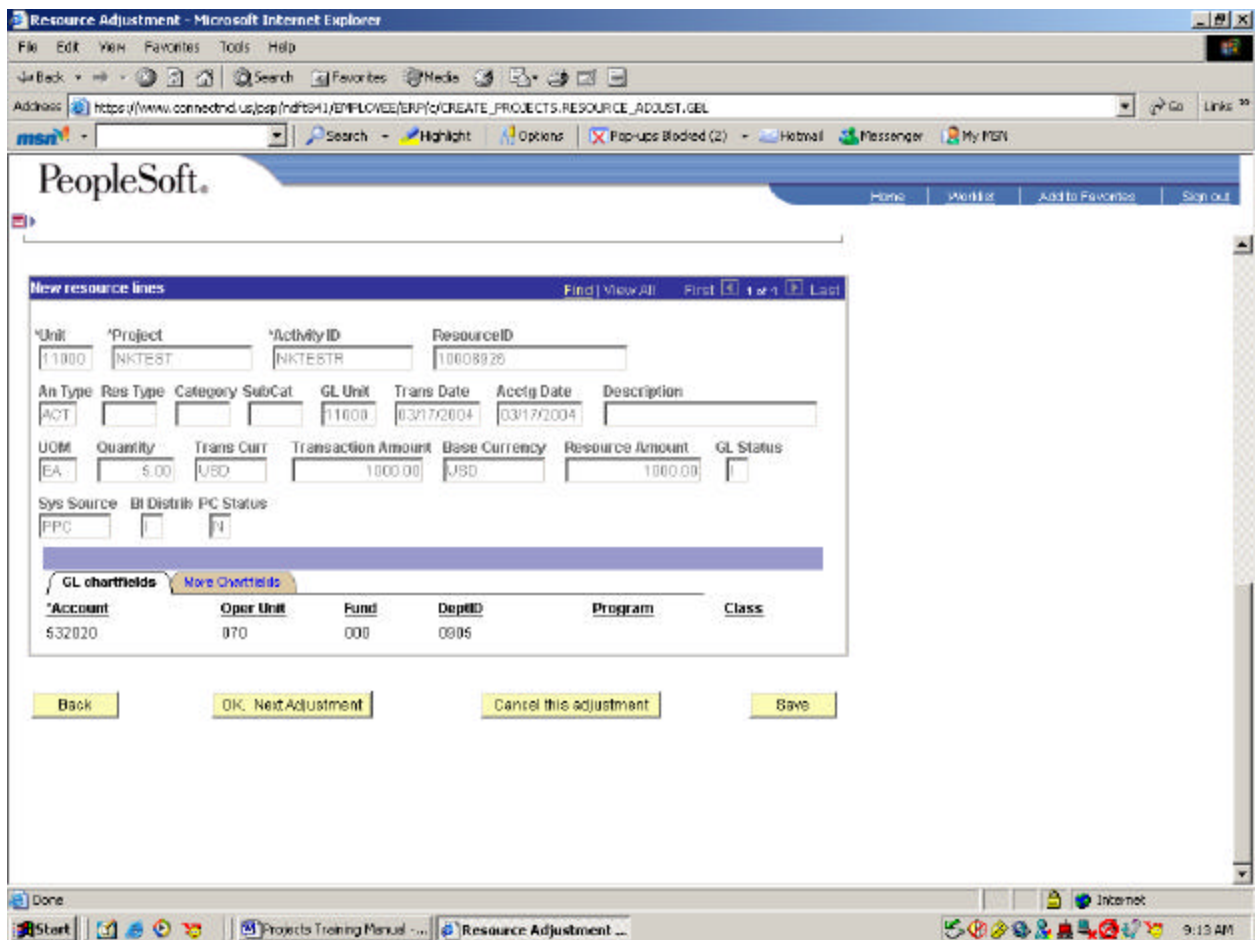
*An Type	Res Type	Category	SubCat	GL Unit	Trans Date	Acctg Date	Description
ACT				11000	02/20/2004	03/17/2004	

UOM	Quantity	Trans Curr	Transaction Amount	Resource Amount	GL Status
EA	-5.00	USD	-1000.00	-1000.00	

Done

Start Projects Training Manual ... Resource Adjustment ...

Internet 9:12 AM



New resource lines

Unit: 11000 Project: NKTEST Activity ID: NKTESTR Resource ID: 10008926

An Type: ACT Res Type: Category: SubCat: GL Unit: 11000 Trans Date: 03/17/2004 Acctg Date: 03/17/2004 Description:

UOM: EA Quantity: 5.00 Trans Curr: USD Transaction Amount: 1000.00 Base Currency: USD Resource Amount: 1000.00 GL Status:

Sys Source: PPC BI Distrib: PC Status:

Account	Oper Unit	Fund	DeptID	Program	Class
532020	070	000	0005		

Buttons: Back, OK, Next Adjustment, Cancel this adjustment, Save

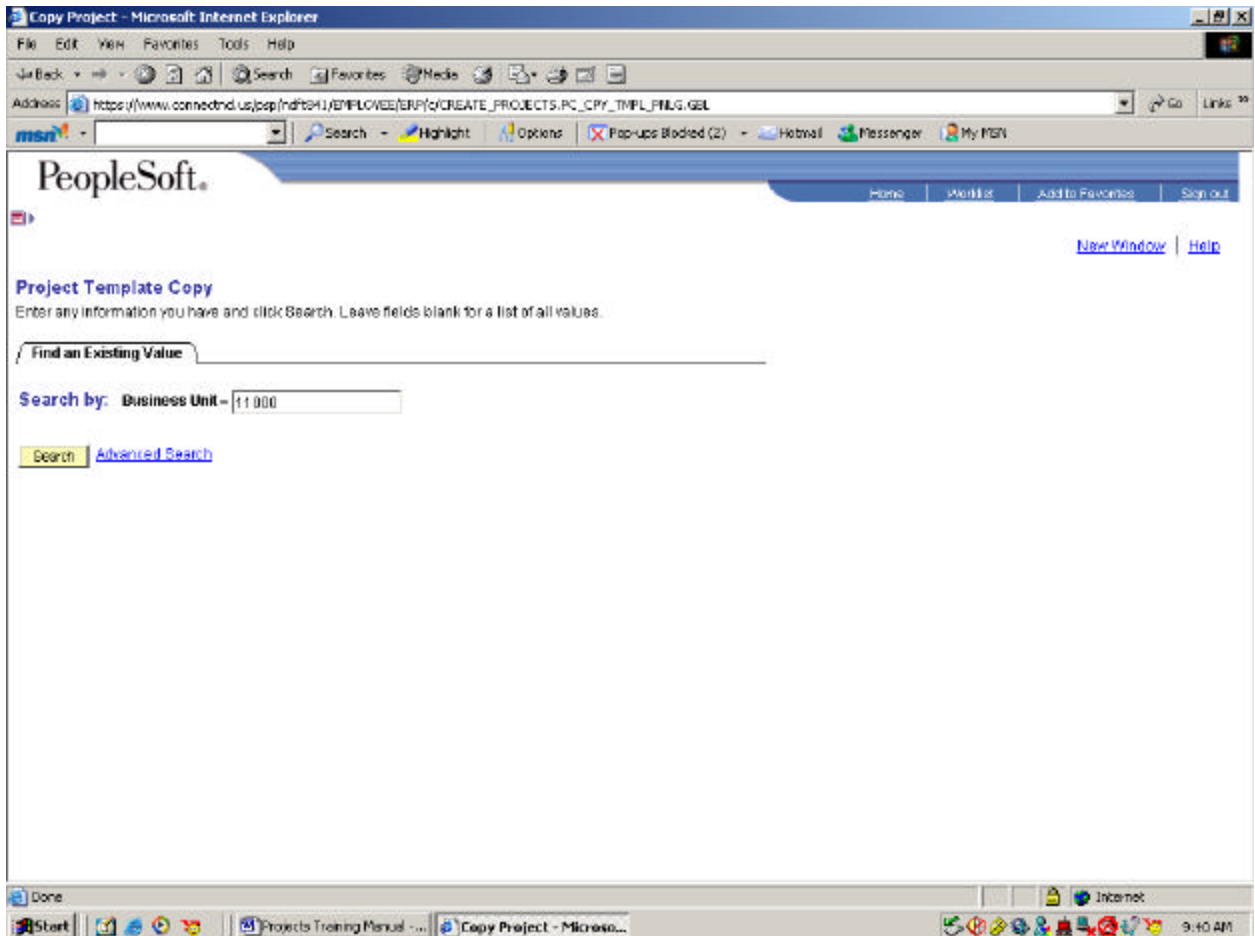
- Review the adjustments on the Finalize Adjustment page.
- Click:
 - **Back**: At any point, click the Back button to return to the previous page.
 - **OK, Next Adjustment**: To accept the changes and return to the Select Project Resources for Adjustment page.
 - **Cancel this adjustment**: To reject the changes and return to the Select Project Resources for Adjustment page.
- You must click **Save** on either the Finalize Adjustment page or the Select Project Resources for Adjustment page to save the changes to the database.


- Upon saving, adjustments to monetary values will be budget checked if Commitment Control is active.

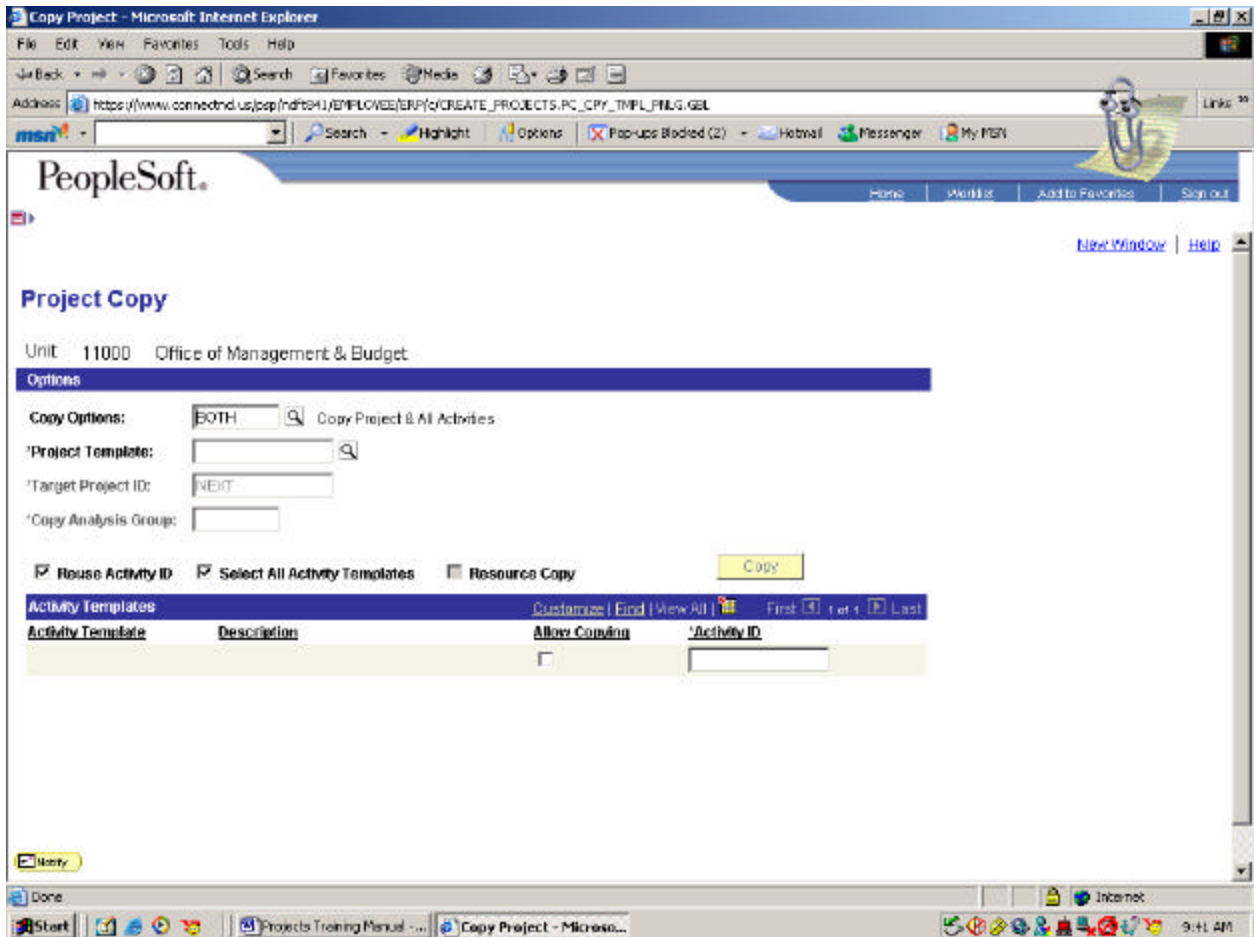
Copying Projects

Projects > Utilities > Copy Project

Note: Project Copy can be accessed through the Utilities or through the Project Definition page.



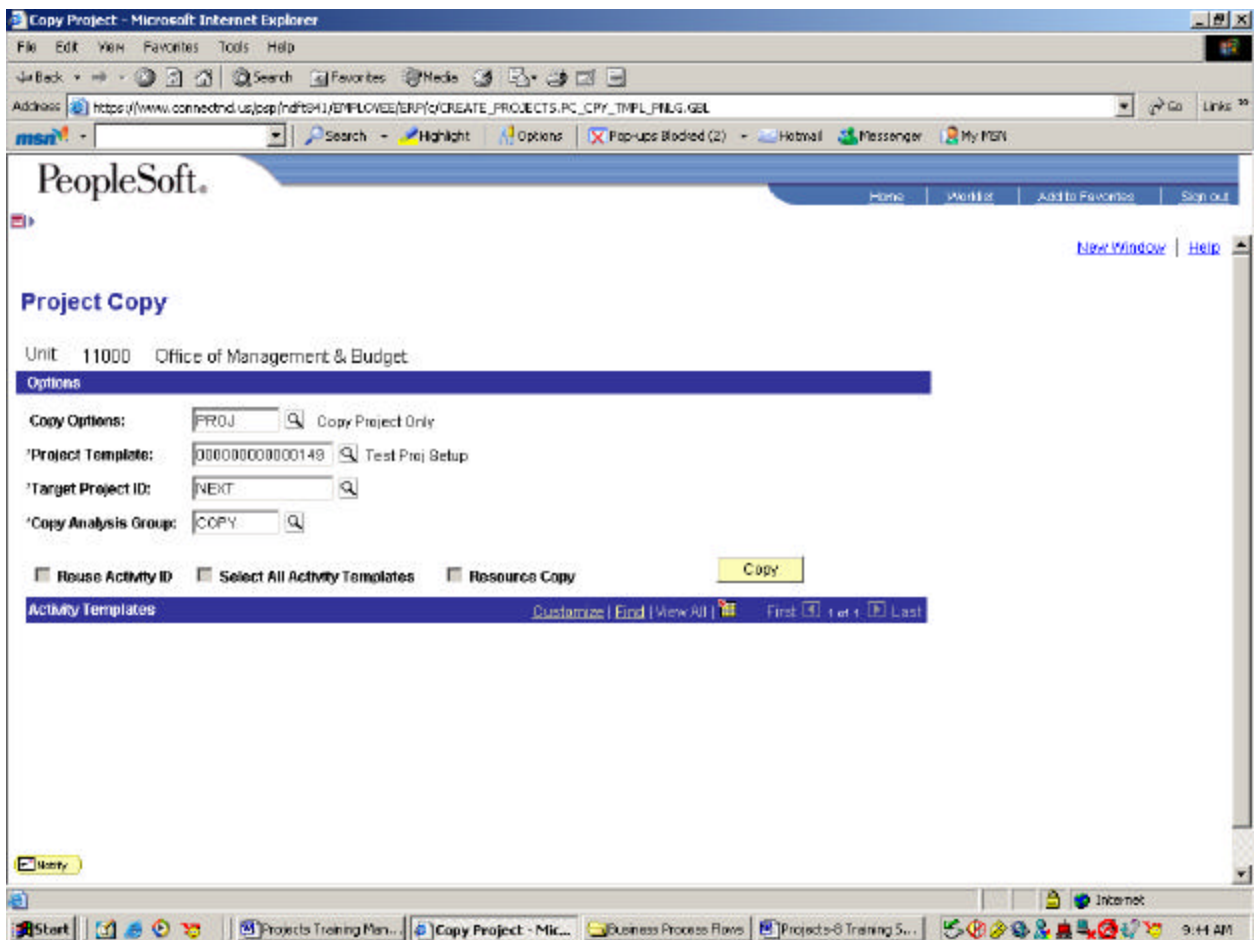
- Business Unit: Select the appropriate Project Business Unit.
- Click .


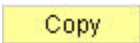


- Select the appropriate Copy Option:
 - Copy Activity Only
 - Copy Project & All Activities
 - Copy Project Only

Note: Checkbox under Options to have the Project defined as a Template must be checked in order to use the Project as a Template. ☒ **Can be used as Template** Each Activity must also have the checkbox under Options checked in order to have the Activity defined as a Template ☐ **Use Activity as Template**.

Copying Project Only



- Copy Options: PROJ
- Project Template: Select the appropriate Template Project within the specific Business Unit. Click  to search Template Project (if needed).
- Target Template: Either enter the new Project ID, or leave 'NEXT' to default to the next auto-sequenced Project ID.
- Copy Analysis Group: Select 'Copy' Analysis Group, which includes all Analysis Types to copy.
- Click .

Note: You will be taken to Project General page of the newly created Project.

Copy Project - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS_PC_COPY_TMPL_FNLG.GEL

PeopleSoft

Home World of Add to Favorites Sign out

New Window Help

Project General Definition Manager Location Phases Approval Justification User Fields

Business Unit: 11000 Office of Management & Budget

*Project: 000000000000182 Create New Project

*Description: Test Proj Setup Add to My Projects

*Integration: 11000 QMB Integration

Project Type: 02 Facility Management

Status: Active

My Projects
Project Summary
Project Team
Project Activities

Description Find | View All First 1 of 1 Last

Date/Time Stamp: 03/17/04 9:47:14AM

User ID: nkhaminepur

Description:

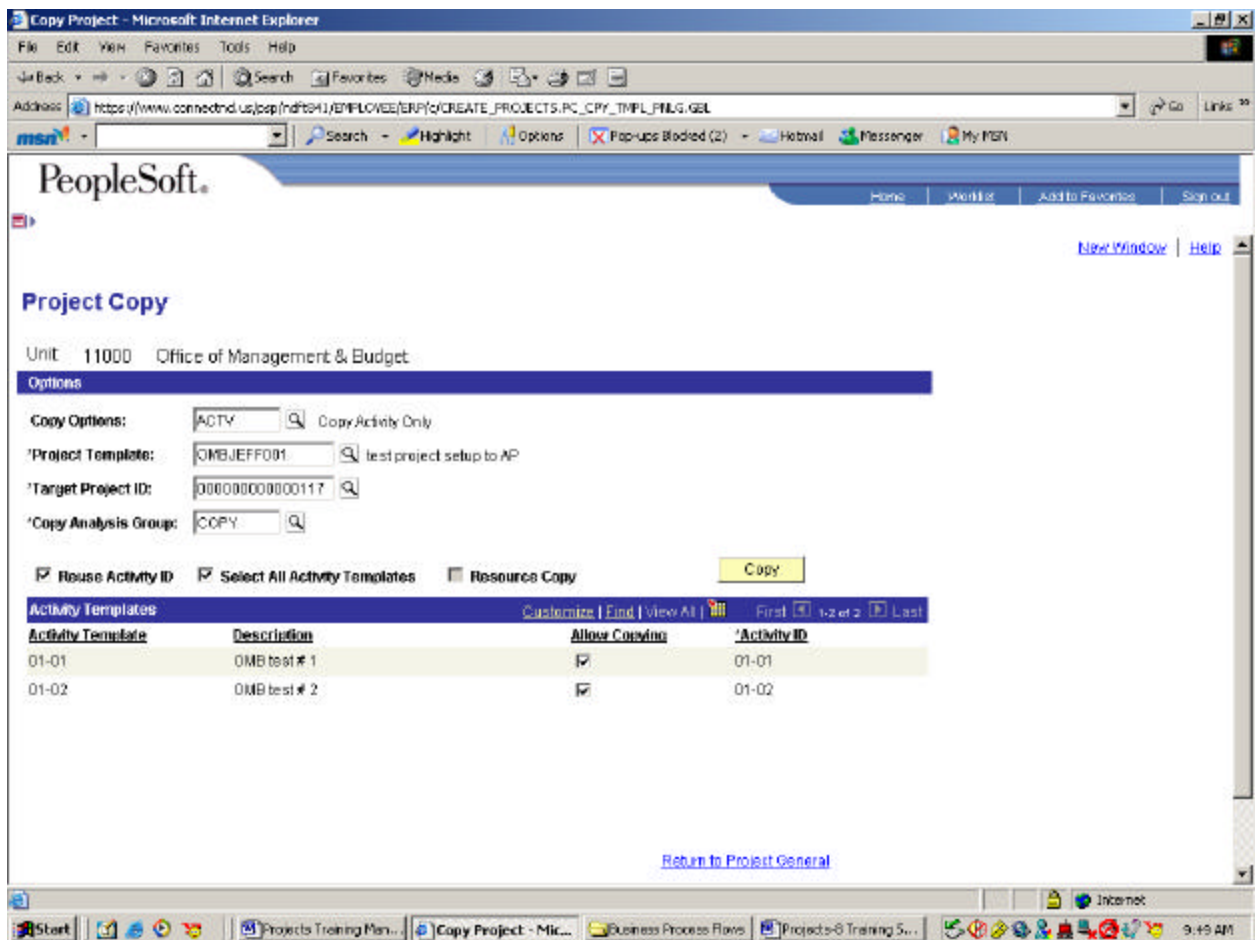
Long Description:

Return to Project Template Copy

Done

Start Projects Training Man... Copy Project - Mic... Business Process Flows Projects-S Training S... 9:47 AM

Copying Activity Only



Project Copy

Unit 11000 Office of Management & Budget

Options

Copy Options: ACTV Copy Activity Only

*Project Template: OMBJEFF001 test project setup to AP


*Target Project ID: 00000000000117

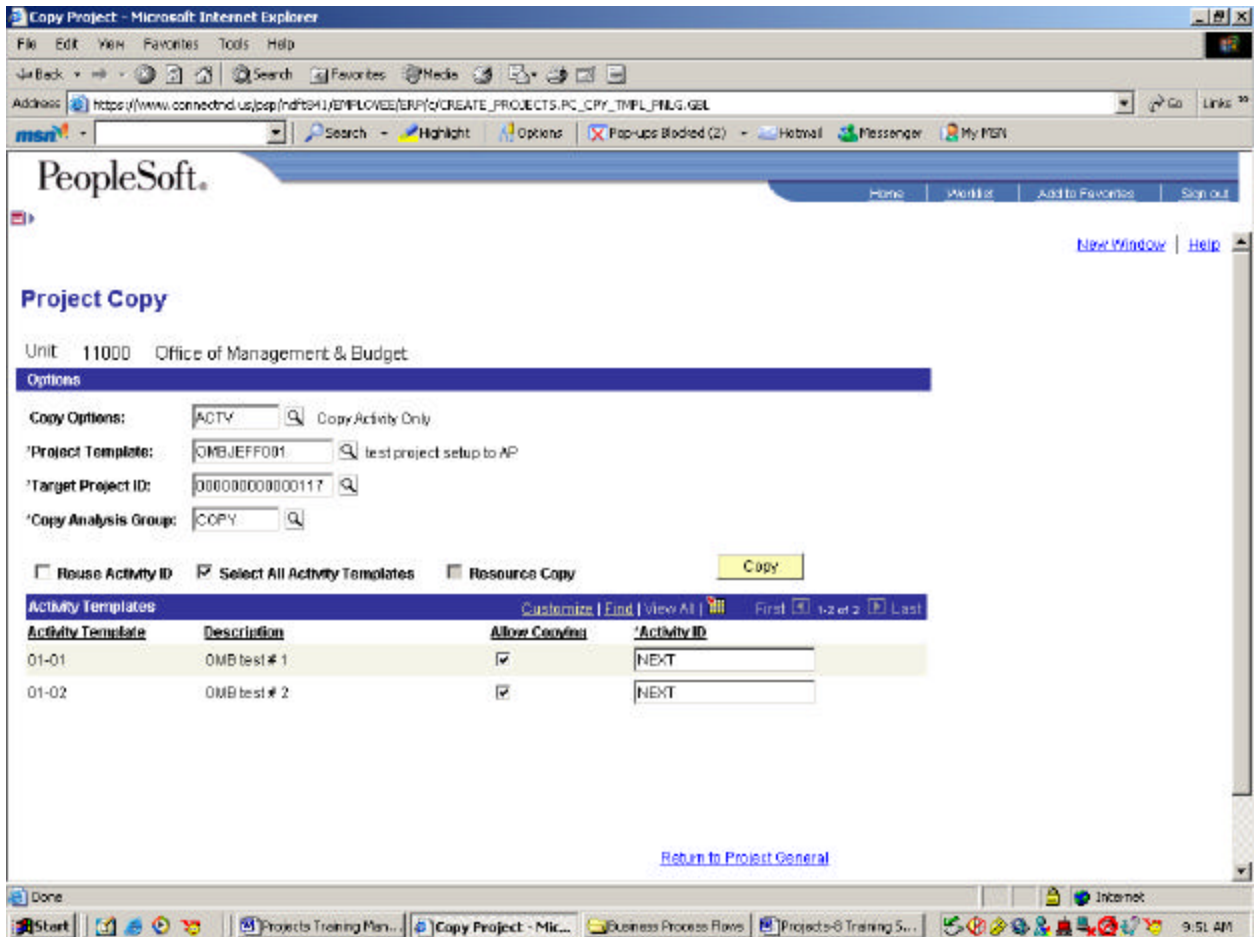
*Copy Analysis Group: COPY

☒ Reuse Activity ID ☒ Select All Activity Templates ☐ Resource Copy **Copy**

Activity Template	Description	Allow Copying	Activity ID
01-01	OMB test # 1	<input checked="" type="checkbox"/>	01-01
01-02	OMB test # 2	<input checked="" type="checkbox"/>	01-02

[Return to Project General](#)

- Copy Options: ACTV
- Project Template: Select the appropriate Template Project within the specific Business Unit. Click  to search Template Project (if needed). Activities are tied to Projects and therefore you must select the Project, which has the Activities you want to copy.
- Target Template: Enter the new Project ID.
- Copy Analysis Group: Select 'Copy' Analysis Group, which includes all Analysis Types to copy.
- Check the checkbox for 'Reuse Activity ID' to reuse the activity id in the newly created Project. Uncheck box to have new Activity Ids assigned through auto-numbering, or to enter an Activity ID.



Project Copy

Unit 11000 Office of Management & Budget

Options

Copy Options: ACTV Copy Activity Only

Project Template: OMBJEFF001 test project setup to AP

Target Project ID: 000000000000117

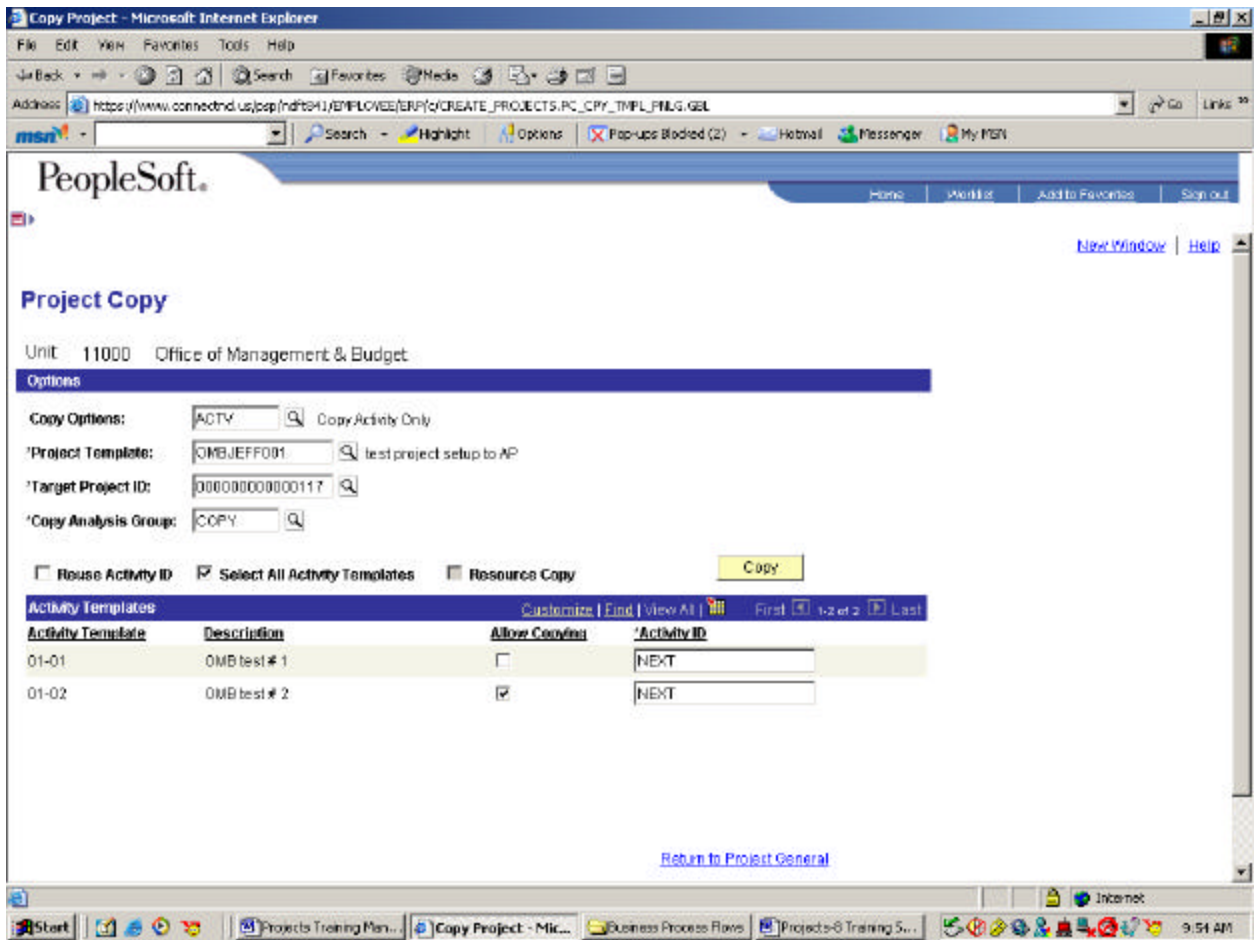
Copy Analysis Group: COPY

☐ Reuse Activity ID ☒ Select All Activity Templates ☐ Resource Copy **Copy**

Activity Template	Description	Allow Copying	Activity ID
01-01	OMB test # 1	<input checked="" type="checkbox"/>	NEXT
01-02	OMB test # 2	<input checked="" type="checkbox"/>	NEXT

[Return to Project General](#)

- Either 'Select All Activity Templates' to selects all available Activity Templates displayed to be copied. Or select the 'Allow Copying' box on the Activity Template line for individual Activities within Project to be copied. Allows selected Activity Templates from the list to be copied while the others are ignored.



Copy Project - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf041/EMPLOYEE/EMP/q/CREATE_PROJECTS.PC_COPY_TMPL.FNL.G.GEL

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New Window Help

Project Copy

Unit 11000 Office of Management & Budget

Options

Copy Options: ACTV Copy Activity Only

*Project Template: OMBJEFF001 test project setup to AP

*Target Project ID: 00000000000117

*Copy Analysis Group: COPY

☐ Reuse Activity ID ☒ Select All Activity Templates ☐ Resource Copy Copy

Activity Templates Customize | End | view All | First | 1-2 of 2 | Last

Activity Template	Description	Allow Copying	Activity ID
01-01	OMB test # 1	<input type="checkbox"/>	NEXT
01-02	OMB test # 2	<input checked="" type="checkbox"/>	NEXT

[Return to Project General](#)

Start | Projects Training Man... | Copy Project - Mic... | Business Process Flows | Projects-0 Training 5... | 9:54 AM

- Click Copy.

Note: You will be taken to Project General page of the existing Project.

Copy Project - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS.PC_COPY_TMPL_PNL.GEL

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Home World of Add to Favorites Sign out

New Window Help

Project General Definition Manager Location Phases Approval Justification User Fields

Business Unit: 11000 Office of Management & Budget

*Project: 000000000000117 Create New Project

*Description: test Add to My Projects

*Integration: 11000 QMB Integration

Project Type: Project Type

Status: Active

My Projects
Project Summary
Project Team
Project Activities

Description Find | View All First 1 of 1 Last

Description
<p>Date/Time Stamp: 03/17/04 9:54:03AM</p> <p>User ID: nkhaminepur</p> <p>Description:</p> <p>Long Description:</p>

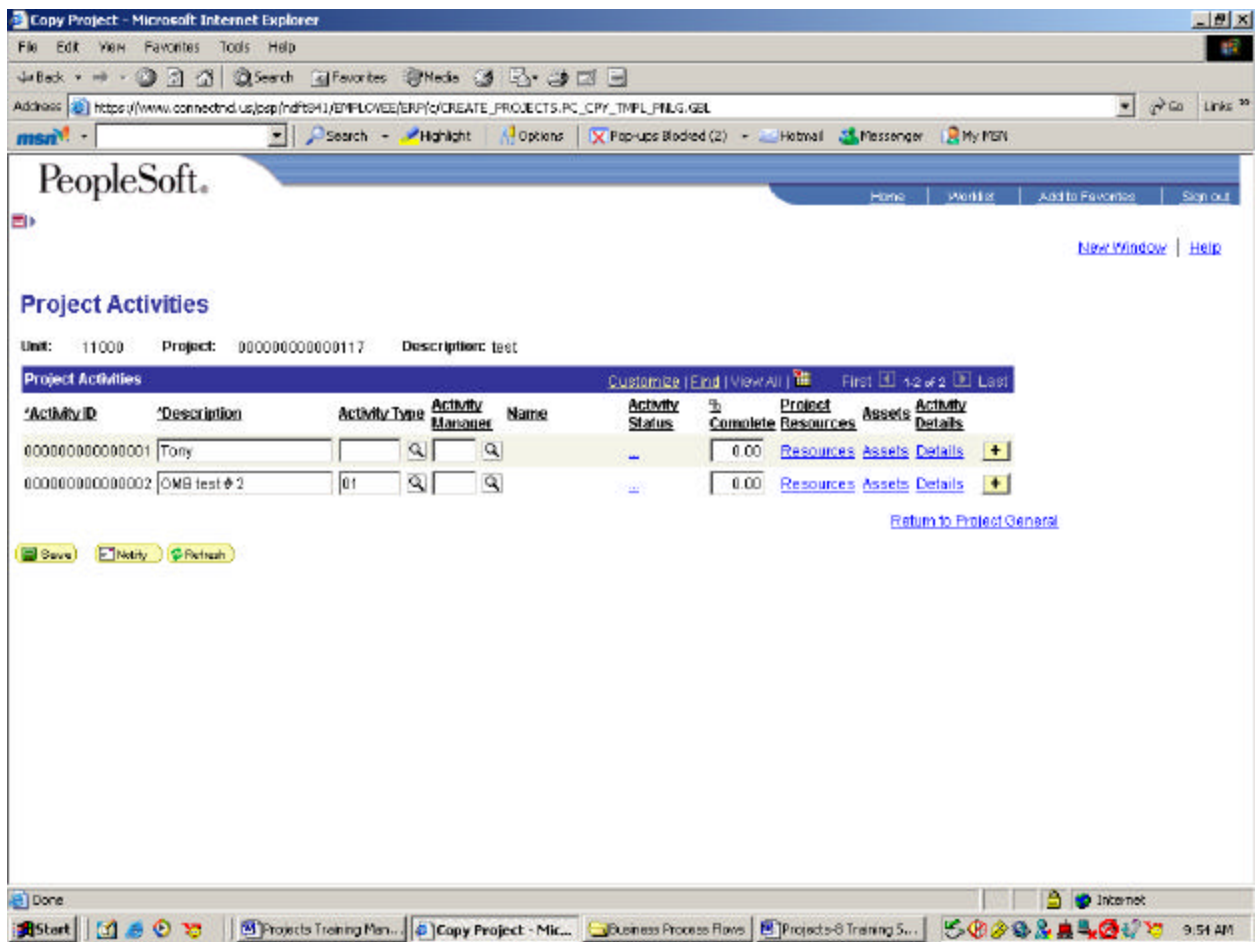
Return to Project Template Copy

Done

Start Projects Training Man... Copy Project - Mic... Business Process Flows Projects-S Training S...

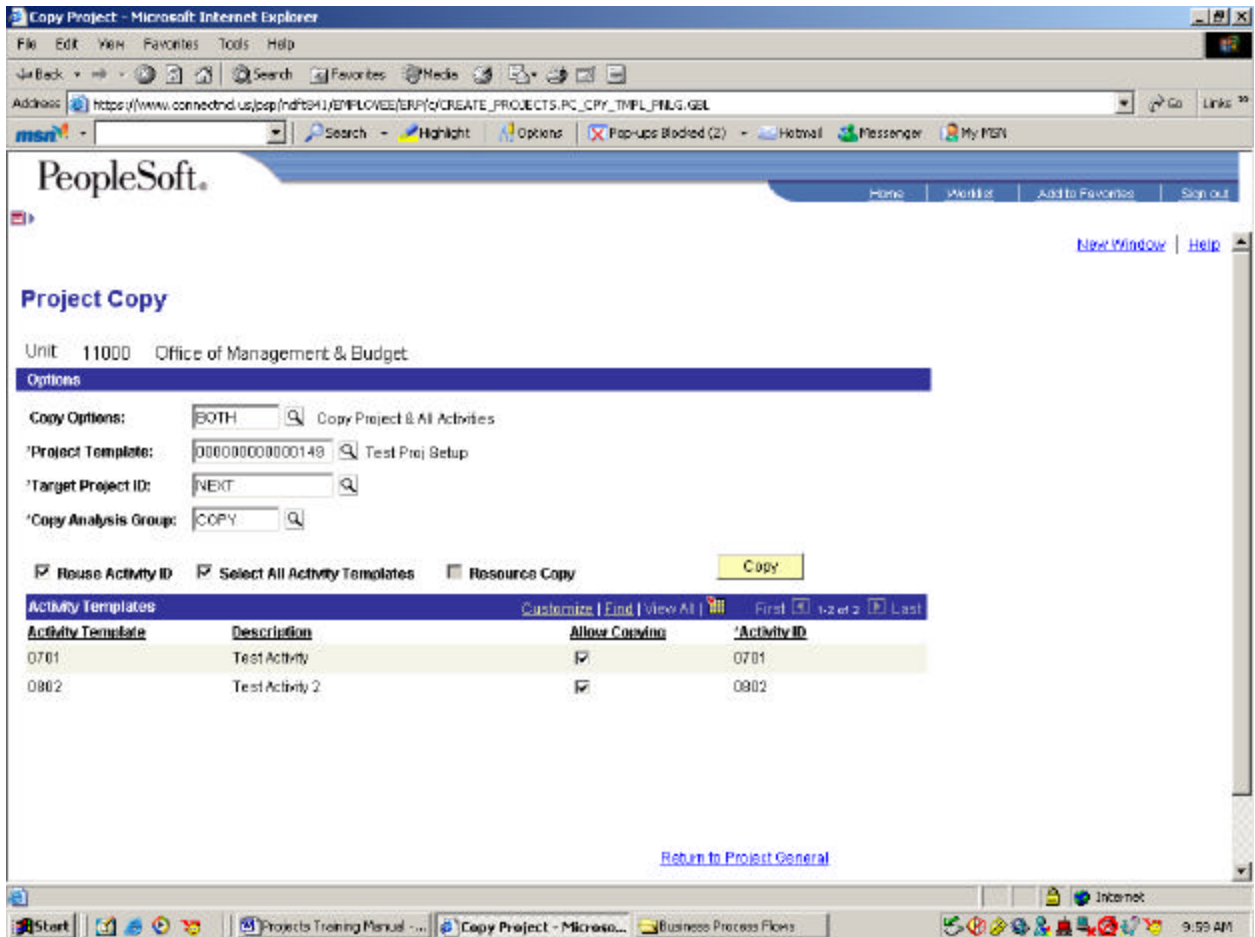
9:54 AM

- Click on the [Project Activities](#) hyperlink.



Note: The Activity ID 'OMB test #2' has been created for this project.

Copying Both Project and Activities



Project Copy

Unit: 11000 Office of Management & Budget

Options

Copy Options: Copy Project & All Activities

Project Template: Test Proj Setup


Target Project ID:

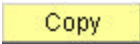
Copy Analysis Group:

☒ Reuse Activity ID ☒ Select All Activity Templates ☐ Resource Copy

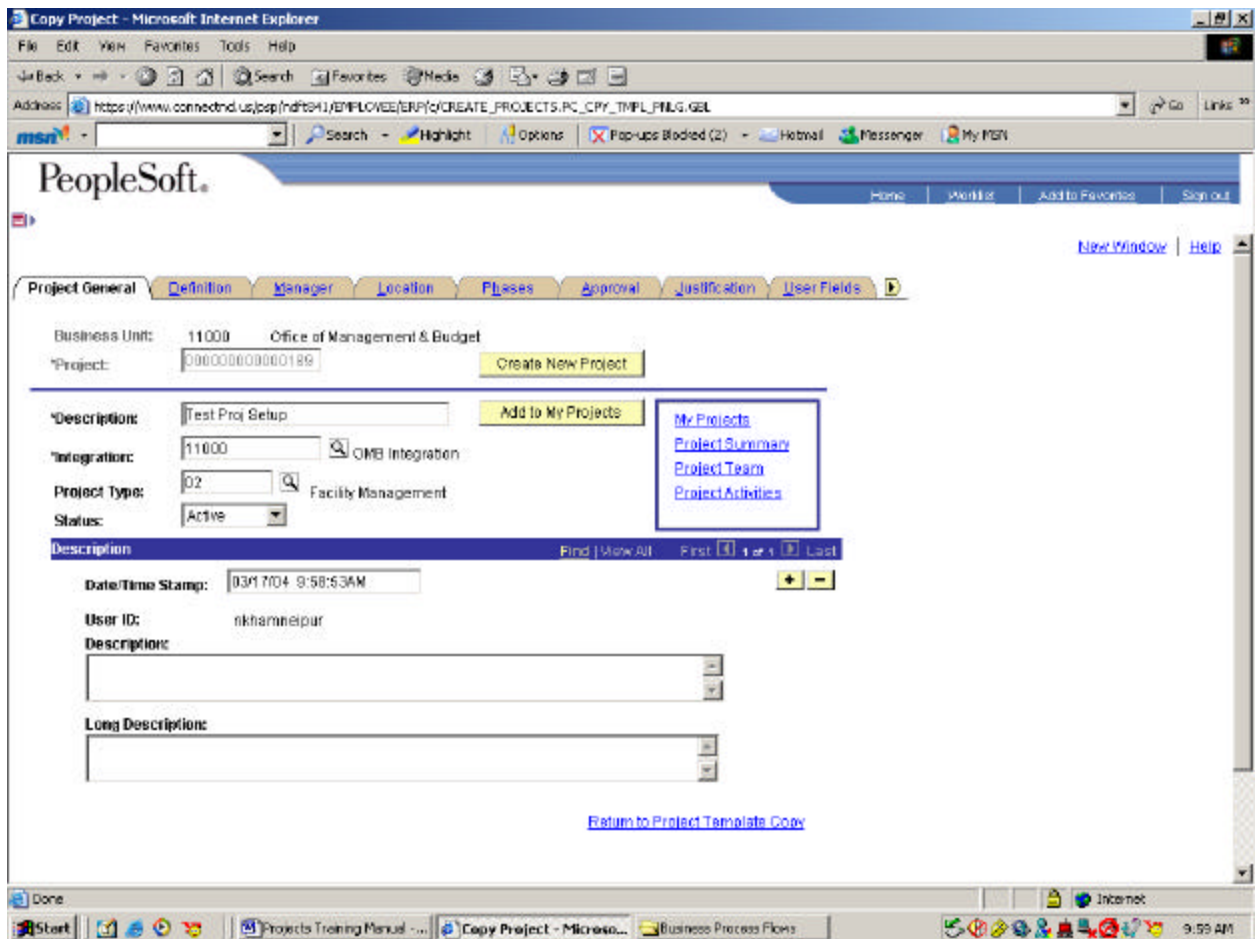
Activity Template	Description	Allow Copying	Activity ID
0701	Test Activity	<input checked="" type="checkbox"/>	0701
0802	Test Activity 2	<input checked="" type="checkbox"/>	0802

[Return to Project General](#)

- Copy Options: BOTH
- Project Template: Select the appropriate Template Project within the specific Business Unit. Click  to search Template Project (if needed).
- Target Template: Either enter the new Project ID, or leave 'NEXT' to default to the next auto-sequenced Project ID.
- Copy Analysis Group: Select 'Copy' Analysis Group, which includes all Analysis Types to copy.
- Check the checkbox for 'Reuse Activity ID' to reuse the activity id in the newly created Project. Uncheck box to have new Activity Ids assigned through auto-numbering, or to enter an Activity ID.

- Either 'Select All Activity Templates' to selects all available Activity Templates displayed to be copied. Or select the 'Allow Copying' box on the Activity Template line for individual Activities within Project to be copied. Allows selected Activity Templates from the list to be copied while the others are ignored.
- Click .

Note: You will be taken to Project General page for the newly created Project.



- Click on the [Project Activities](#) hyperlink.

Copy Project - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS_PC_COPY_TMPL_PNL.GEL

msn Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My MSN

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New Window Help

Project Activities

Unit: 11000 Project: 000000000000100 Description: TestProj Setup

Activity ID	Description	Activity Type	Activity Manager	Name	Activity Status	% Complete	Project Resources	Assets	Activity Details
0701	Test Activity					0.00	Resources	Assets	Details +
0802	Test Activity 2					0.00	Resources	Assets	Details +

Return to Project General

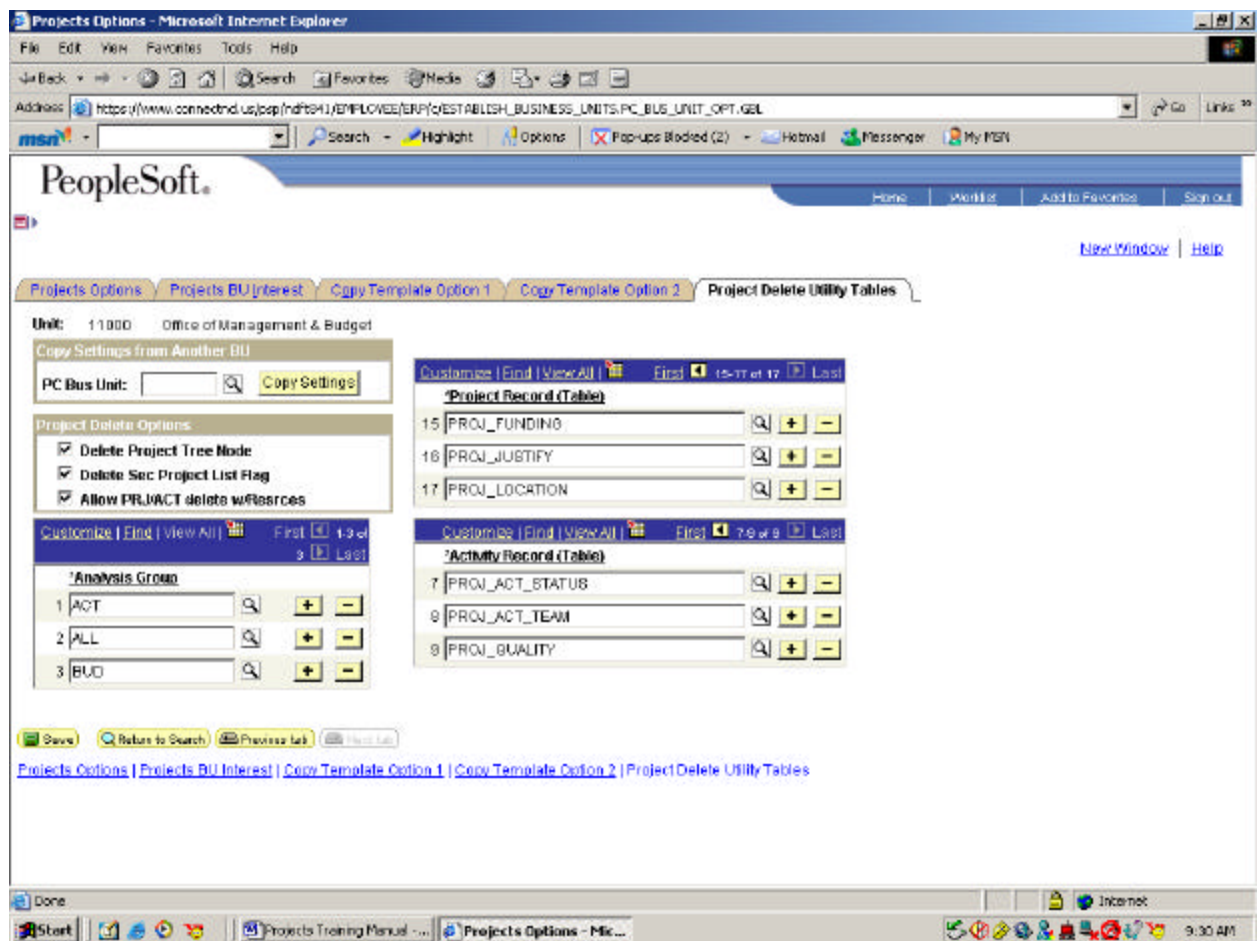
Save Notify Refresh

Start Projects Training Manual -... Copy Project - Microso... Business Process Flows 10:00 AM

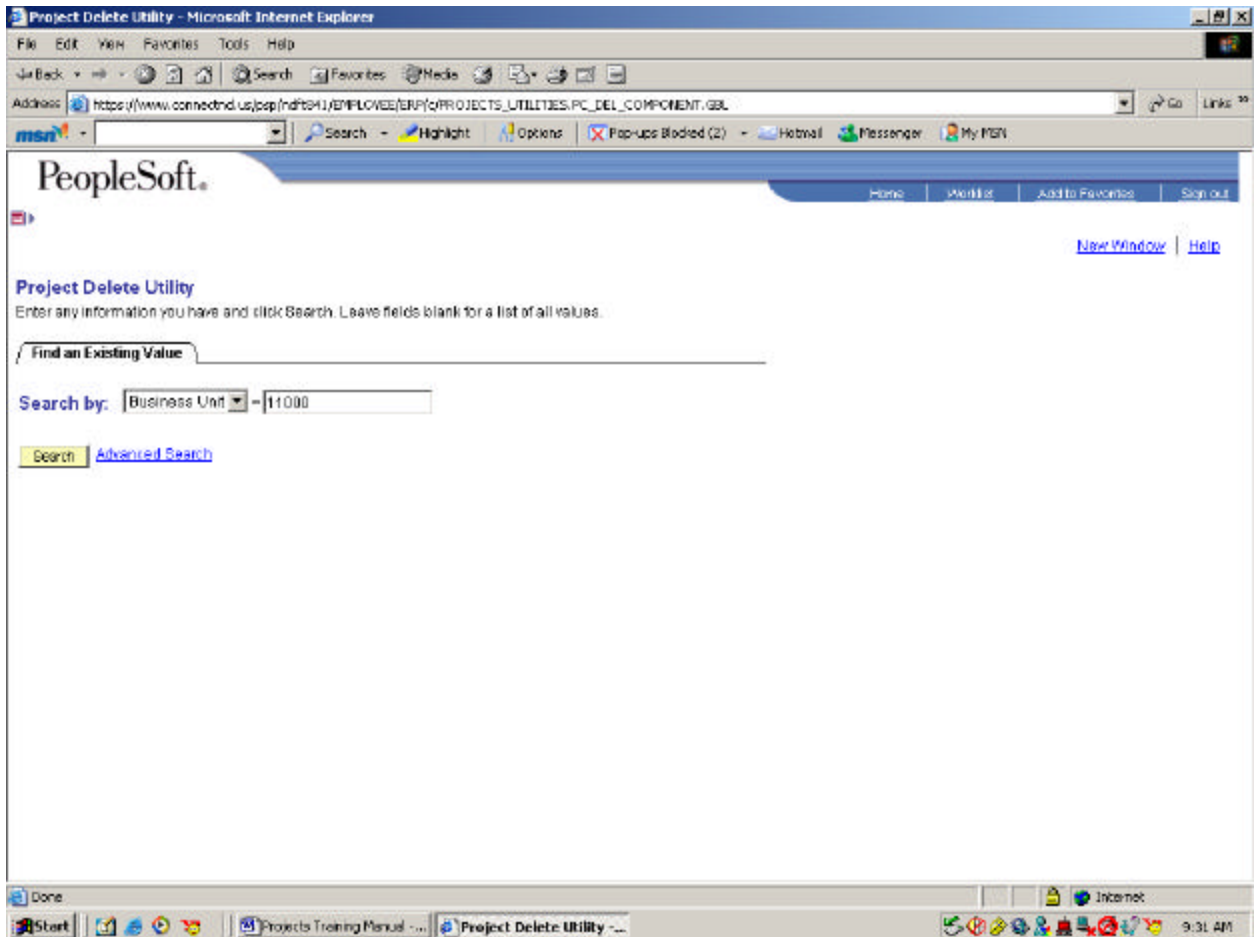
Deleting Projects


Projects > Utilities > Project Delete Utility

Note: The Projects Business Unit must be setup for Deletions.



- The delete utility is used to delete projects, activities, and/or resources from the database.
- Deletions are permanent and irreversible.
- If a deletion is necessary, it will be handled by OMB.



- Business Unit: Select the appropriate Project Business Unit.
- Click .

Project Delete Utility

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search by: Business Unit = 11000

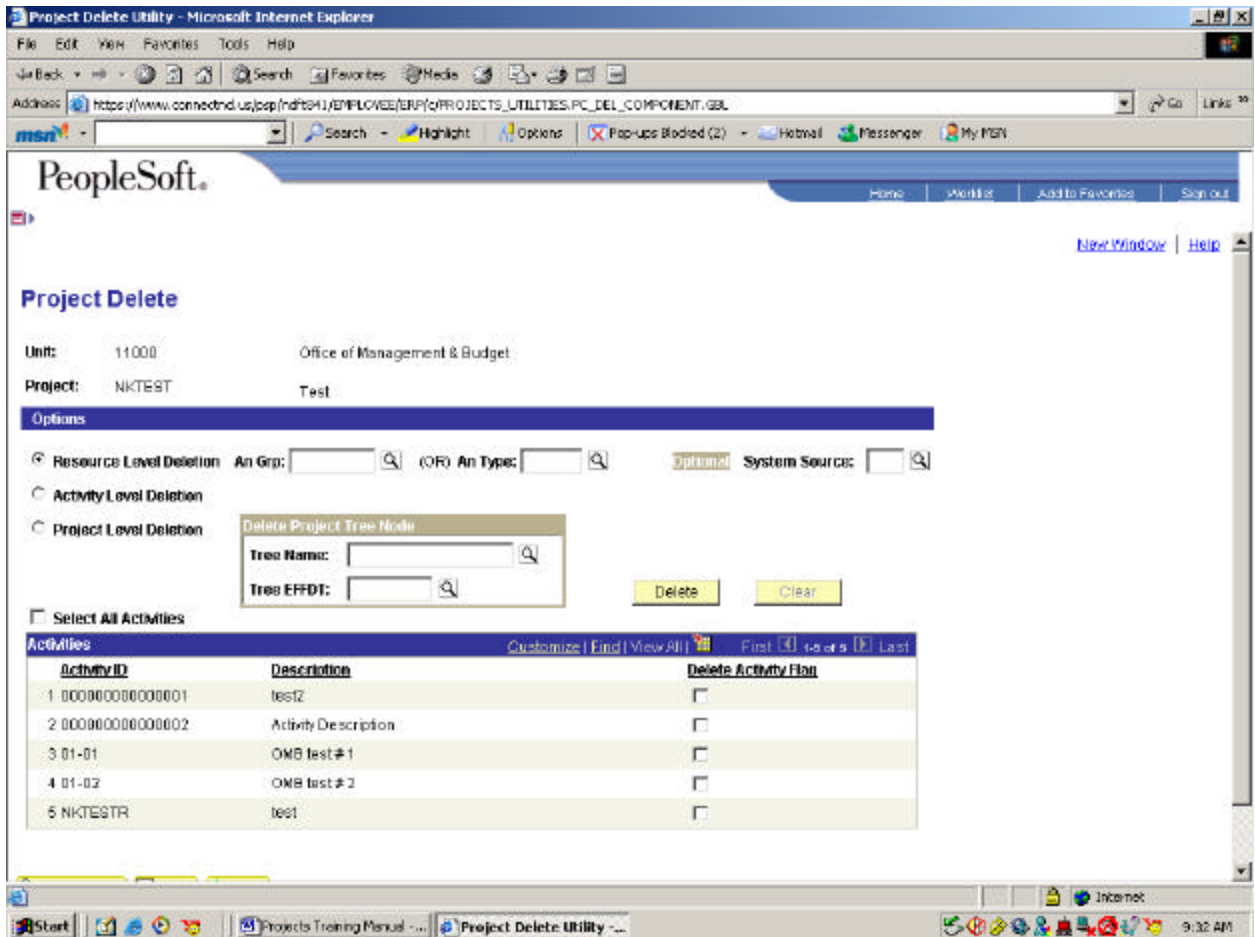
Search Advanced Search

Search Results

View All First 1-79 of 79 Last

Business Unit	Project	Description	Project Type
11000	0000000000000000	test	(blank)
11000	0000000000000117	test	(blank)
11000	0000000000000119	test	02
11000	0000000000000124	Update	01
11000	0000000000000125	update	02
11000	0000000000000126	update	(blank)
11000	0000000000000128	update	(blank)
11000	0000000000000148	test project	(blank)
11000	0000000000000149	Test Proj Setup	02
11000	0000000000000150	Test Proj Setup	02
11000	0000000000000151	C Dup Test	01
11000	0000000000000152	C Dup Test	01
11000	0000000000000153	C Dup Test	01
11000	0000000000000155	test ap-proj session	(blank)
11000	0000000000000156	test ap-proj session	(blank)

- Select the appropriate Business Unit and Project.



Project Delete

Unit: 11000 Office of Management & Budget
Project: NKTEST Test

Options

☒ Resource Level Deletion An Grp: (OF) An Type: Optional System Source: ☐
☐ Activity Level Deletion
☐ Project Level Deletion

Delete Project Tree Node

Tree Name:
Tree EFFDT: Delete Clear

☐ Select All Activities

Activity ID	Description	Delete Activity Flag
1 00000000000001	test2	<input type="checkbox"/>
2 00000000000002	Activity Description	<input type="checkbox"/>
3 01-01	OMB test #1	<input type="checkbox"/>
4 01-02	OMB test #2	<input type="checkbox"/>
5 NKTESTR	test	<input type="checkbox"/>

- Select the appropriate 'Level Deletion'.
 - Resource Level Deletion
 - Activity Level Deletion
 - Project Level Deletion

Note: Analysis Group or Analysis Type is required when you select Resource Level Deletion.

Example of Resource Level Deletion.

Project Delete Utility - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf0241/EMPLOYEE/HRPG/PROJCTES_UTILITIES_PC_DEL_COMPONENT.GBL

Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My PGN

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New Window Help

Project Delete

Unit: 11000 Office of Management & Budget
Project: NKTEST Test

Options

☒ Resource Level Deletion An Grp: ALL (OR) An Type: Optional System Sources:

☐ Activity Level Deletion

☐ Project Level Deletion

Delete Project Tree Node

Tree Name: Tree EFFDT:

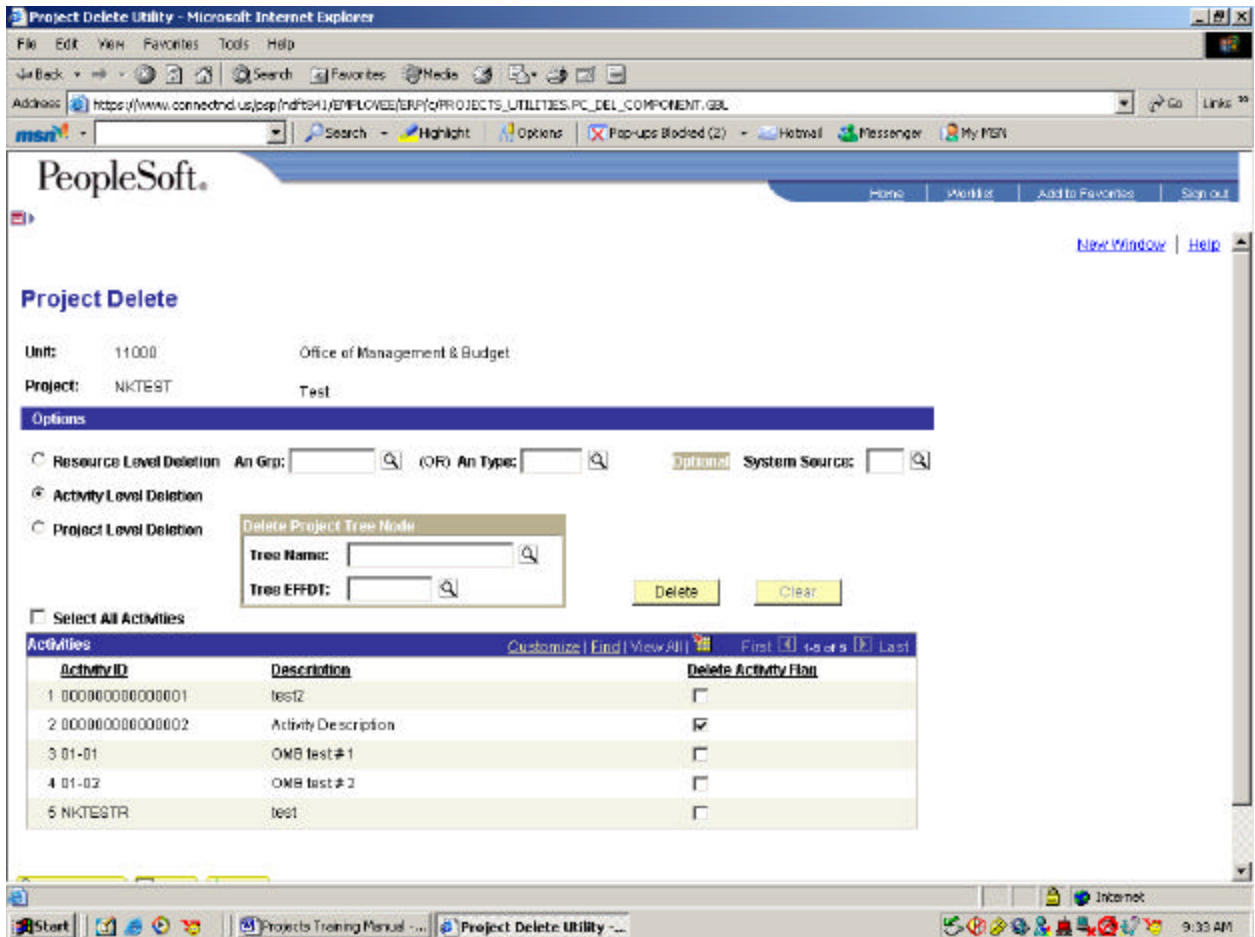
Delete Clear

☐ Select All Activities

Activity ID	Description	Delete Activity Flag
1 0000000000000001	test2	<input type="checkbox"/>
2 0000000000000002	Activity Description	<input type="checkbox"/>
3 01-01	OMB test #1	<input type="checkbox"/>
4 01-02	OMB test #2	<input type="checkbox"/>
5 NKTESTR	test	<input type="checkbox"/>

Start Projects Training Manual Project Delete Utility 9:32 AM

Example of Activity Level Deletion.



- Either Select All Activities checkbox ☒ , or select the individual Delete Activity Flag checkbox ☒ for the Activity(s) within the Project you want to delete.
- All resource transactions within the Project / Activity will also be deleted.

Example of Project Level Deletion.

Project Delete Utility - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf0241/EMPLOYEE/HRFY/PROJETS_UTILITIES/PC_DEL_COMPONENT.GBL

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New Window Help

Project Delete

Unit: 11000 Office of Management & Budget
Project: NKTEST Test

Options

☐ Resource Level Deletion An Grp: [] (OR) An Type: [] **Optional** System Sources: []

☐ Activity Level Deletion

☒ Project Level Deletion

Delete Project Tree Node

Tree Name: []
Tree EFFDT: []

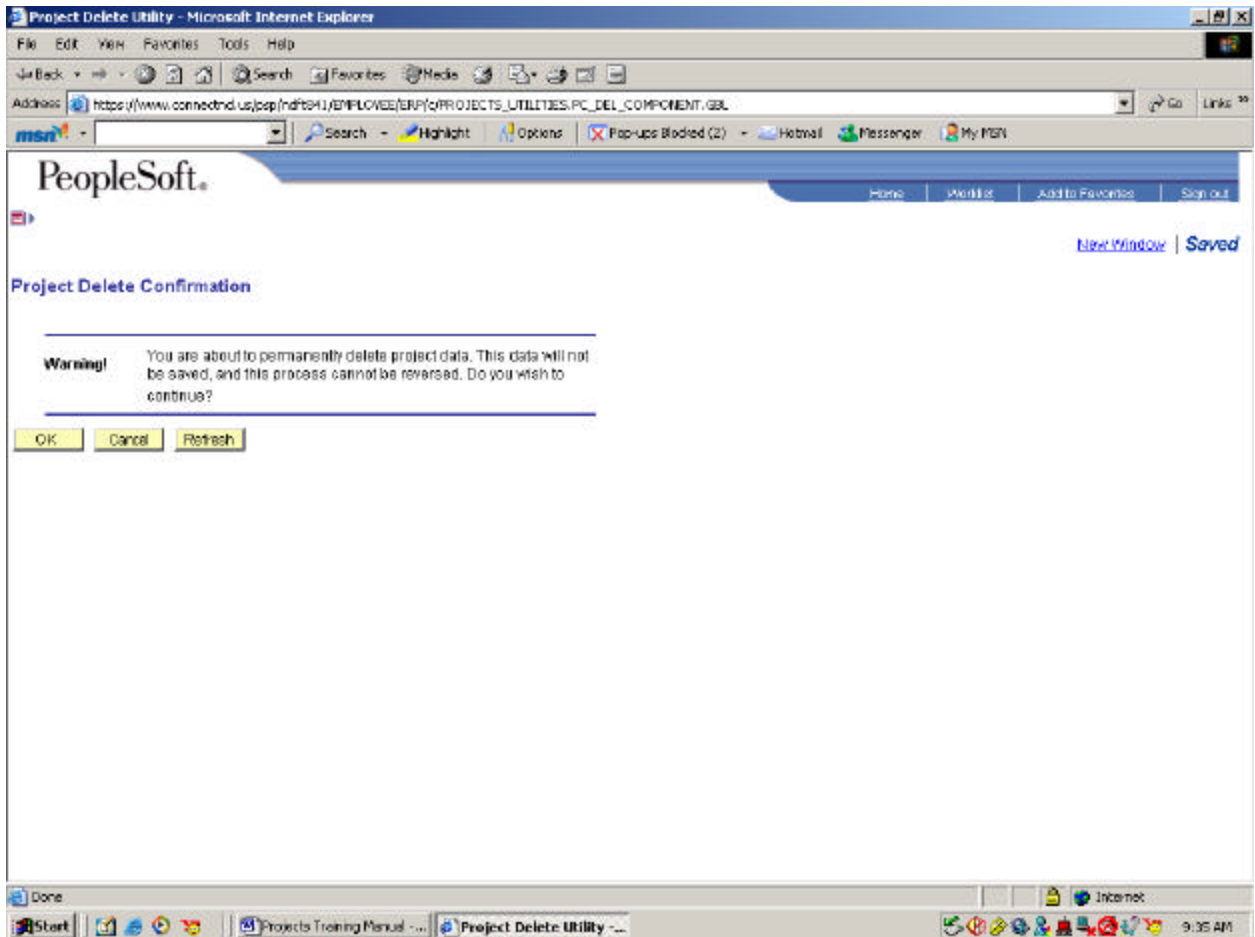
Delete Clear



☐ Select All Activities

Activity ID	Description	Delete Activity Flag
1 0000000000000001	test2	<input type="checkbox"/>
2 0000000000000002	Activity Description	<input type="checkbox"/>
3 01-01	OMB test #1	<input type="checkbox"/>
4 01-02	OMB test #2	<input type="checkbox"/>
5 NKTESTR	test	<input type="checkbox"/>

Start [] Projects Training Manual [] Project Delete Utility [] 9:35 AM

- Click **Delete**.



- Click  on Project Delete Confirmation page.
- Click  on the Project Delete Confirmation page to cancel the deletion.

Project Delete Utility - Microsoft Internet Explorer

Address: https://www.connectnd.us/bsp/ndf041/EMPLOYEE/EMP/q/PROJECTS_UTILITIES_PC_DEL_COMPONENT.GBL

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Unit: 11000 Office of Management & Budget
Project: NKTEST Test

Options

☐ Resource Level Deletion An Grp: (OR) An Type: Optional System Source:

☒ Activity Level Deletion

☐ Project Level Deletion

Select All Activities

Activity ID	Description	Delete Activity Flag
1 0000000000000001	test2	<input type="checkbox"/>
2 0000000000000002	Activity Description	<input checked="" type="checkbox"/>
3 01-01	OMB test # 1	<input type="checkbox"/>
4 01-02	OMB test # 2	<input type="checkbox"/>
5 NKTESTR	test	<input type="checkbox"/>

Return to Search Notify Refresh

javascript:submission_win0(document.win0, '#(C)Cancel()');

Start Projects Training Manual Project Delete Utility 9:35 AM

- Click **Clear** to define new criteria for the deletion.

Project Delete Utility - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/PROJECTS_UTILITIES_PC_DEL_COMPONENT.GBL

msn Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My MSN

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Project Delete

Unit: 11000 Office of Management & Budget
Project: NKTEST Test

Options

☐ Resource Level Deletion An Grp: [] (OR) An Type: [] Optional System Source: []
☒ Activity Level Deletion
☐ Project Level Deletion

Delete Project Tree Node

Tree Name: []
Tree EFFDT: [] Delete Clear

☐ Select All Activities

Activity ID	Description	Delete Activity Flag
1 000000000000001	test2	<input type="checkbox"/>
2 000000000000002	Activity Description	<input checked="" type="checkbox"/>
3 01-01	OMB test # 1	<input type="checkbox"/>
4 01-02	OMB test # 2	<input type="checkbox"/>
5 NKTESTR	test	<input type="checkbox"/>


Return to Search Notify Refresh

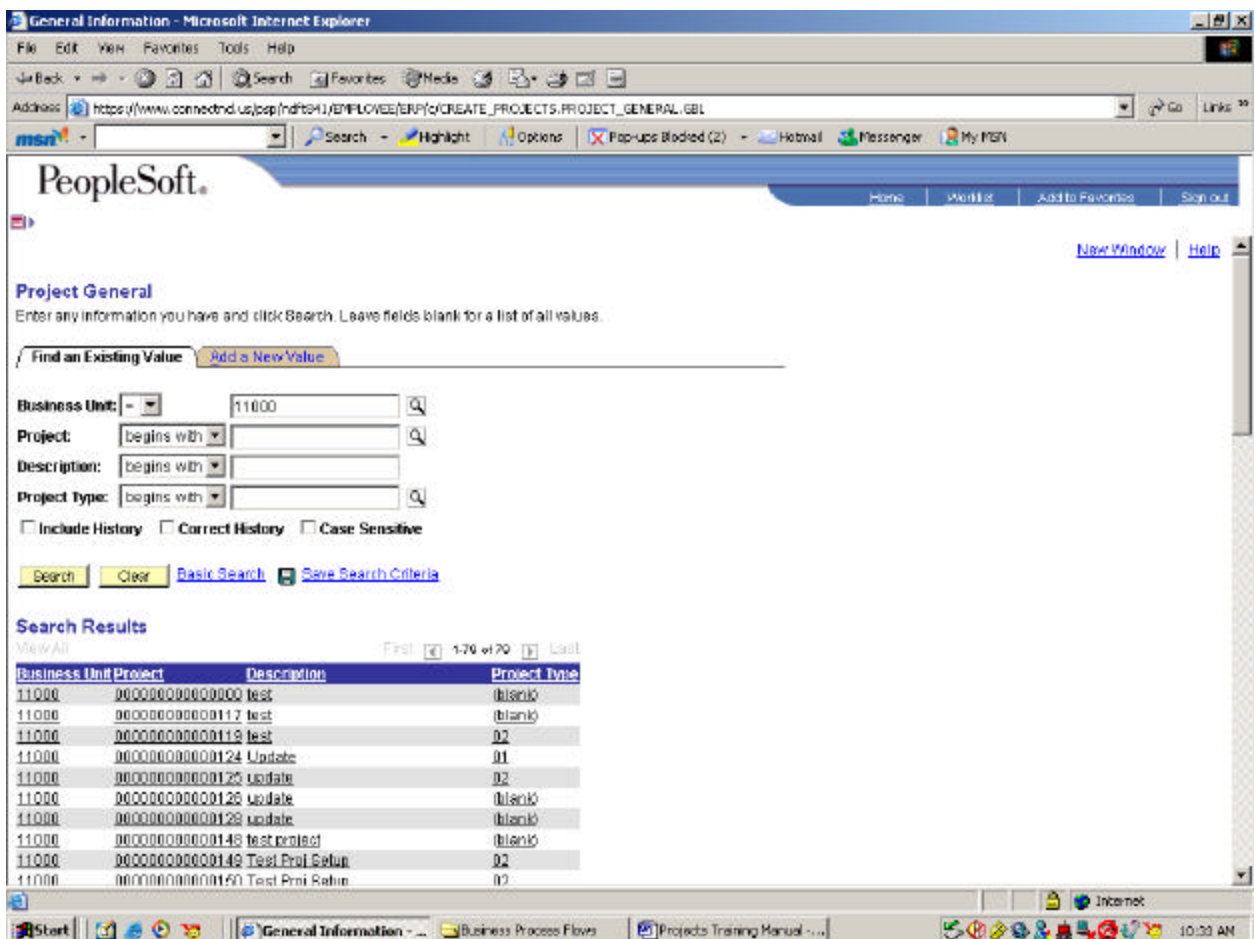
Done Start Projects Training Manual -... Project Delete Utility -... 9:37 AM

Inactivating Projects

Note: Inactivating a specific Project will not allow subsystems to choose or process data for that Project including all Activities within the Project.


Projects > Projects > General Information


- Business Unit: Enter the appropriate Projects Business Unit. Click on the magnifying glass icon  to see a list of valid values.




Project General
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Business Unit: 

Project: 

Description:

Project Type: 

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Search Results
View All First 179 of 179 Last

Business Unit	Project	Description	Project Type
11000	000000000000000000	test	(blank)
11000	00000000000117	test	(blank)
11000	00000000000119	test	02
11000	00000000000124	Update	01
11000	00000000000125	update	02
11000	00000000000126	update	(blank)
11000	00000000000128	update	(blank)
11000	00000000000148	test project	(blank)
11000	00000000000149	Test Proj Setup	02
11000	00000000000150	Test Proj Rating	02

- Click .
- Select the Project within the Business Unit you want to inactivate.

General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/psp/ndf0041/EMPLOYEE/EMP/q/CREATE_PROJECTS.PROJECT_GENERAL.GBL

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Home World Add to Favorites Sign out

New Window Help

Project General Definition Manager Location Phases Approval Justification User Fields

Business Unit: 11000 Office of Management & Budget

*Project: NKTEST Create New Project

*Description: Test Add to My Projects

*Integration: 11000 OMB Integration

Project Type:

Status: Active

My Projects
Project Summary
Project Team
Project Activities

Description Find | View All First 1 2 3 Last

Date/Time Stamp: 03/17/04 10:33:48AM

User ID: nkhamneipar

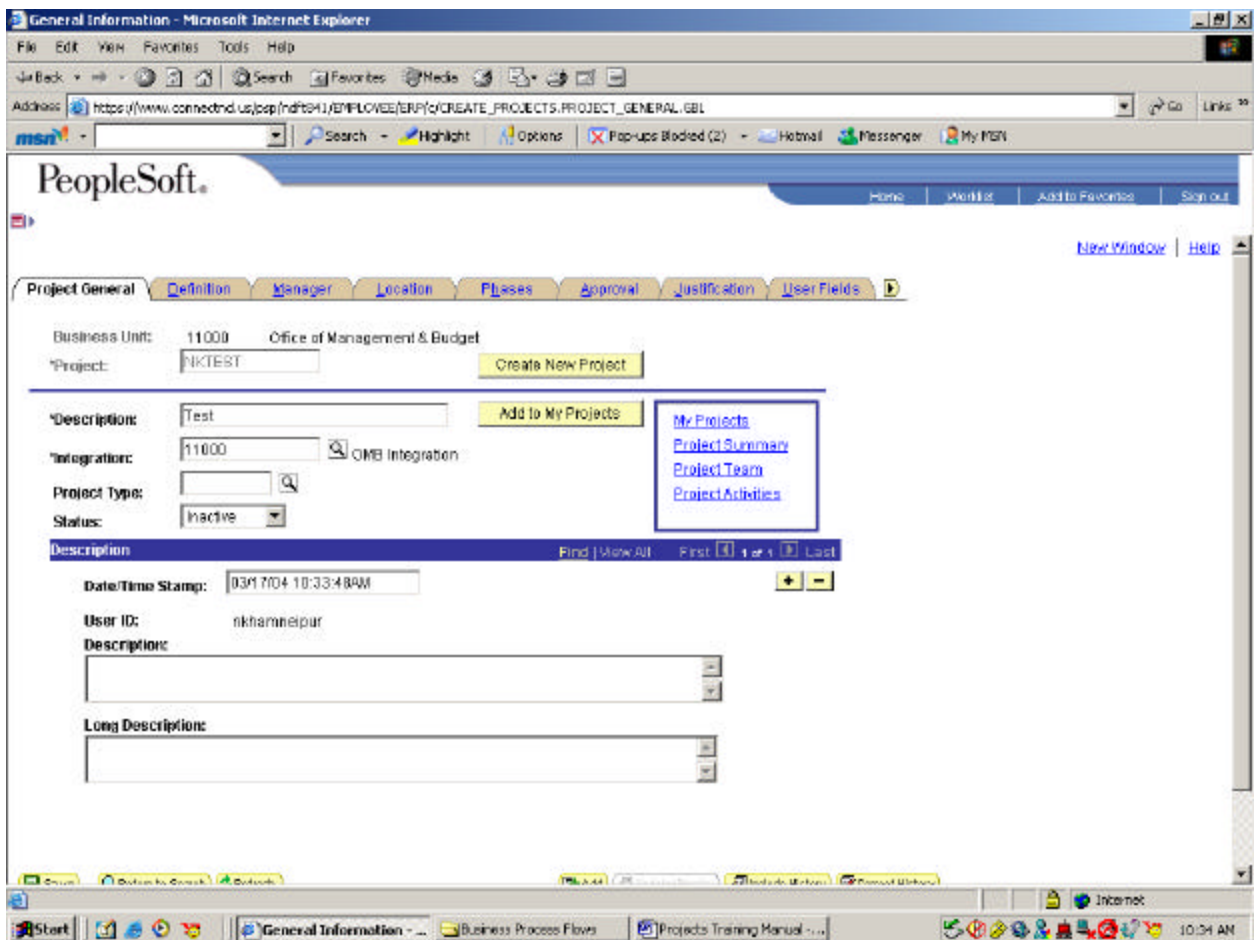
Description:

Long Description:

Taskbar: Start, General Information, Business Process Flow, Projects Training Manual, Internet, 10:34 AM

- Change the status to 'Inactive'.

Status: Inactive



General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf0041/EMPLOYEE/EMP/q/CREATE_PROJECTS.PROJECT_GENERAL.GBL

PeopleSoft.

Home World Add to Favorites Sign out

New Window Help

Project General Definition Manager Location Phases Approval Justification User Fields

Business Unit: 11000 Office of Management & Budget

*Project: NKTEST Create New Project

*Description: Test Add to My Projects

*Integration: 11000 OMB Integration

Project Type:

Status: Inactive

My Projects
Project Summary
Project Team
Project Activities

Description Find | View All First 4 1 Last

Date/Time Stamp: 03/17/04 10:33:48AM

User ID: nikhamneipar

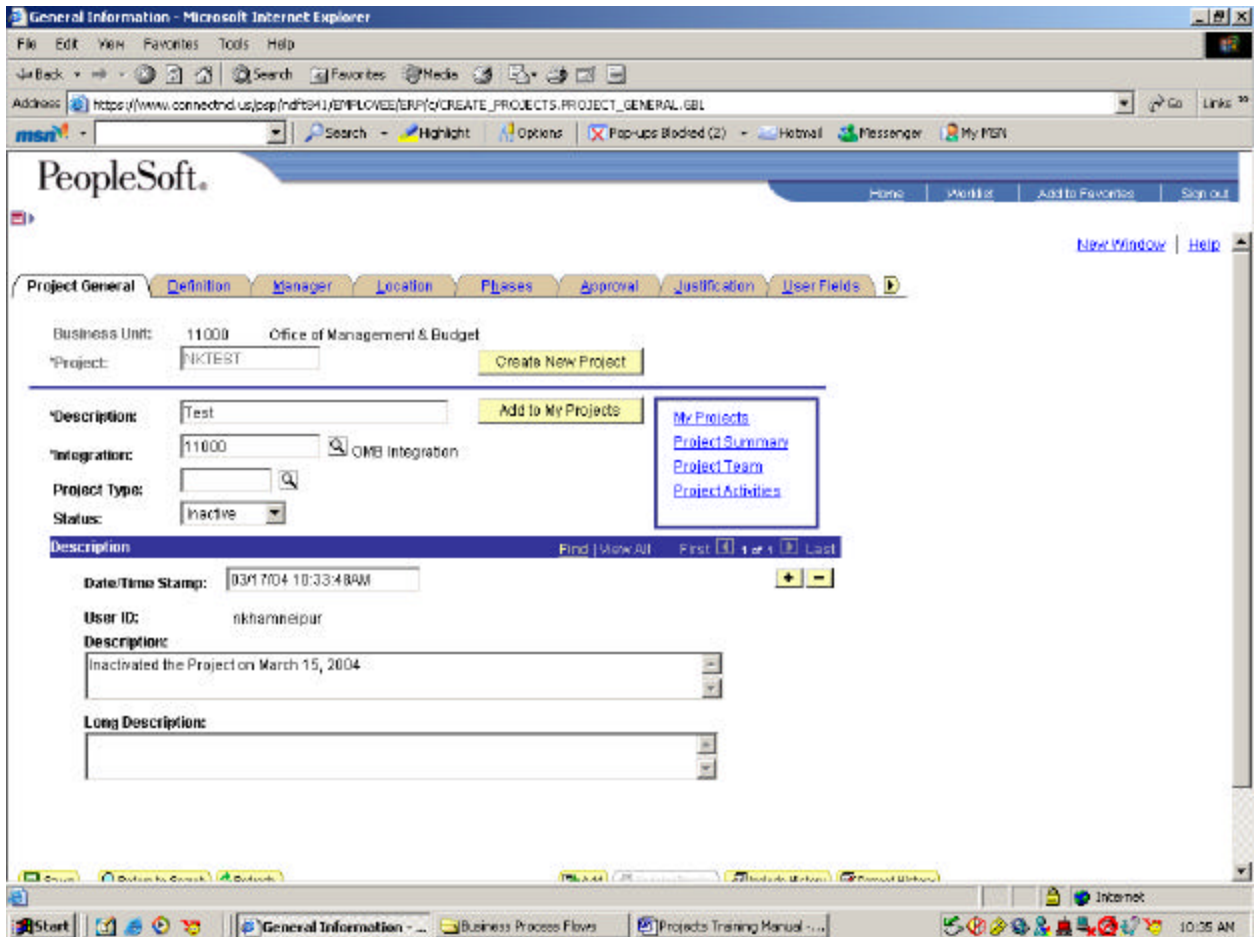
Description:

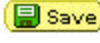

Long Description:

Start Business Process Flows Projects Training Manual 10:34 AM

Note: The status of a project defaults to 'Active'. Change the status to Inactive when you do NOT want any subsystems to be able to send incoming information to this particular Project. This includes all activities tied to this project.

- Enter the appropriate date of the 'Inactivation' in the description field.



- This is informational and will allow you to have some record as to when this project was inactivated.
- Click  Save.
- To re-activate a project once it has been inactivated, you must change the status to 'Active' and add a new row to the description by clicking the add icon . Add relevant date information as to when the Project was re-activated in the new description field. This way a record will be kept as to the active history related to the project.

General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf0041/EMPLOYEE/EMP/q/CREATE_PROJECTS.PROJECT_GENERAL.GBL

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New Window Help

Project General Definition Manager Location Phases Approval Justification User Fields

Business Unit: 11000 Office of Management & Budget

*Project: NKTEST Create New Project

*Description: Test Add to My Projects

*Integration: 11000 OMB Integration

Project Type: Project Type

Status: Active

My Projects
Project Summary
Project Team
Project Activities

Description Find | View All First 1 2 3 Last

Date/Time Stamp: 04/17/04 10:35:45AM

User ID: nkhaminepar

Description: Activated Project on April 17

Long Description:

Save Submit to Search Submit

General Information Business Process Flows Projects Training Manual



10:36 AM

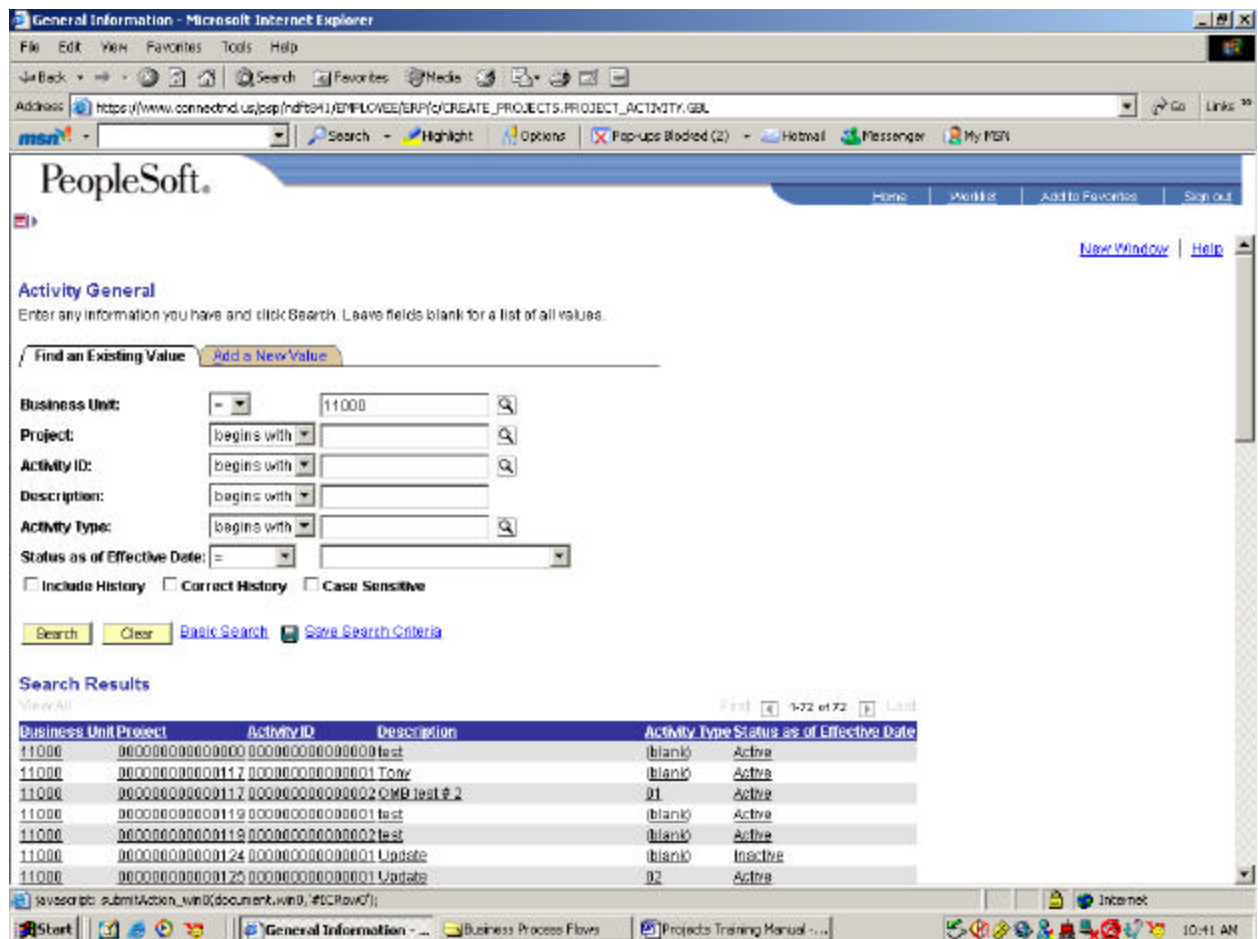
- Click .

Inactivating Activities

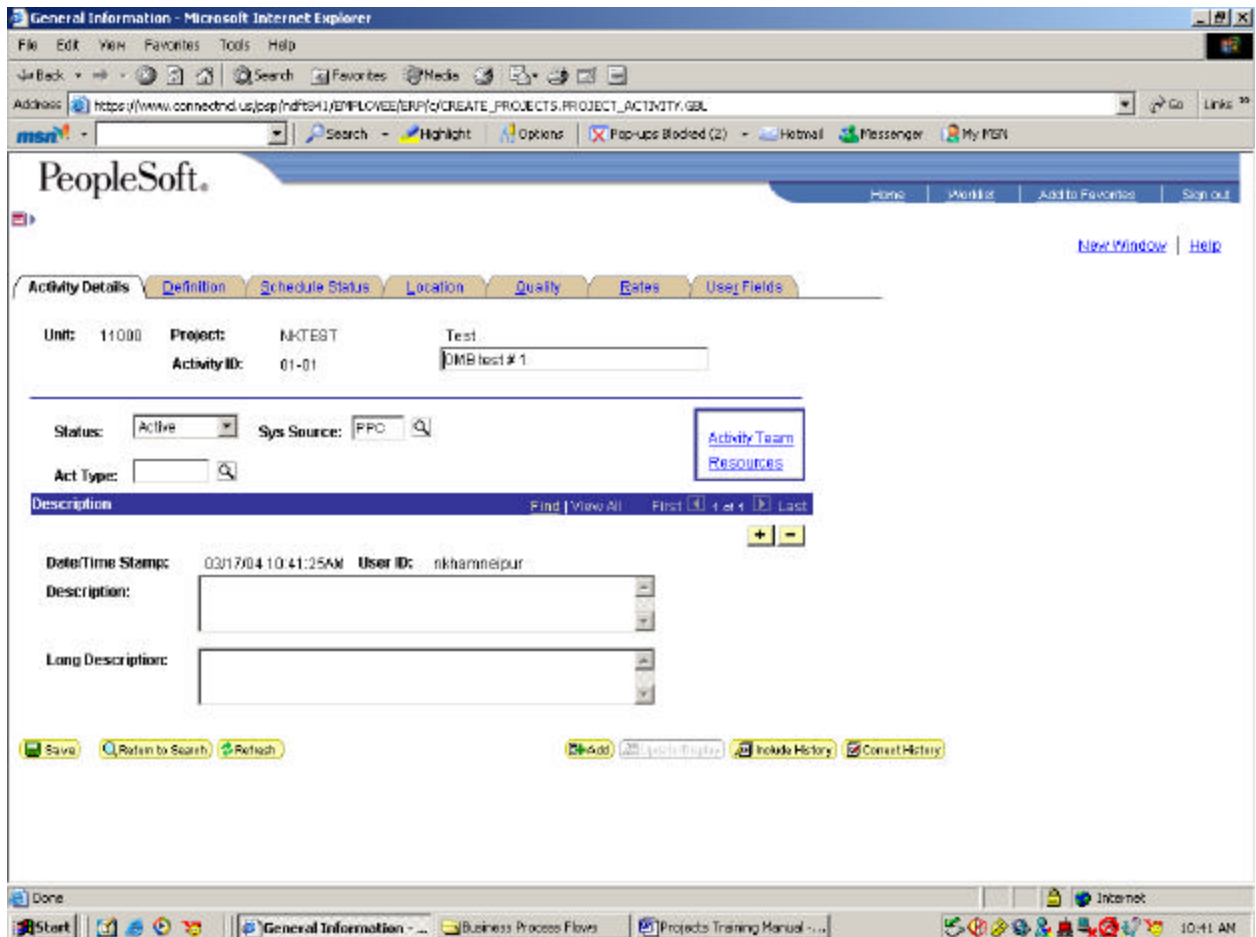
Project > Activities > General Information

Note: Inactivating a specific Activity within the project will not allow subsystems to choose or process data for that Project / Activity combination.

- Business Unit: Enter the appropriate Projects Business Unit. Click on the magnifying glass icon  to see a list of valid values.
- Click .



- Select the Activity with the Project that you want to deactivate.



General Information - Microsoft Internet Explorer

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Address: https://www.connectnd.us/psp/ndf041/EMPLOYEE/EMP/c/CREATE_PROJECTS.PROJECT_ACTIVITY.GBL

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Activity Details Definition Schedule Status Location Quality Rates User Fields

Unit: 11000 Project: NKTEST Test

Activity ID: 01-01 OMB test # 1

Status: Active Sys Source: PPO

Act Type:

Description Find View All First 4 of 4 Last

Date/Time Stamp: 03/17/04 10:41:25AM User ID: nkhamneipur

Description:

Long Description:

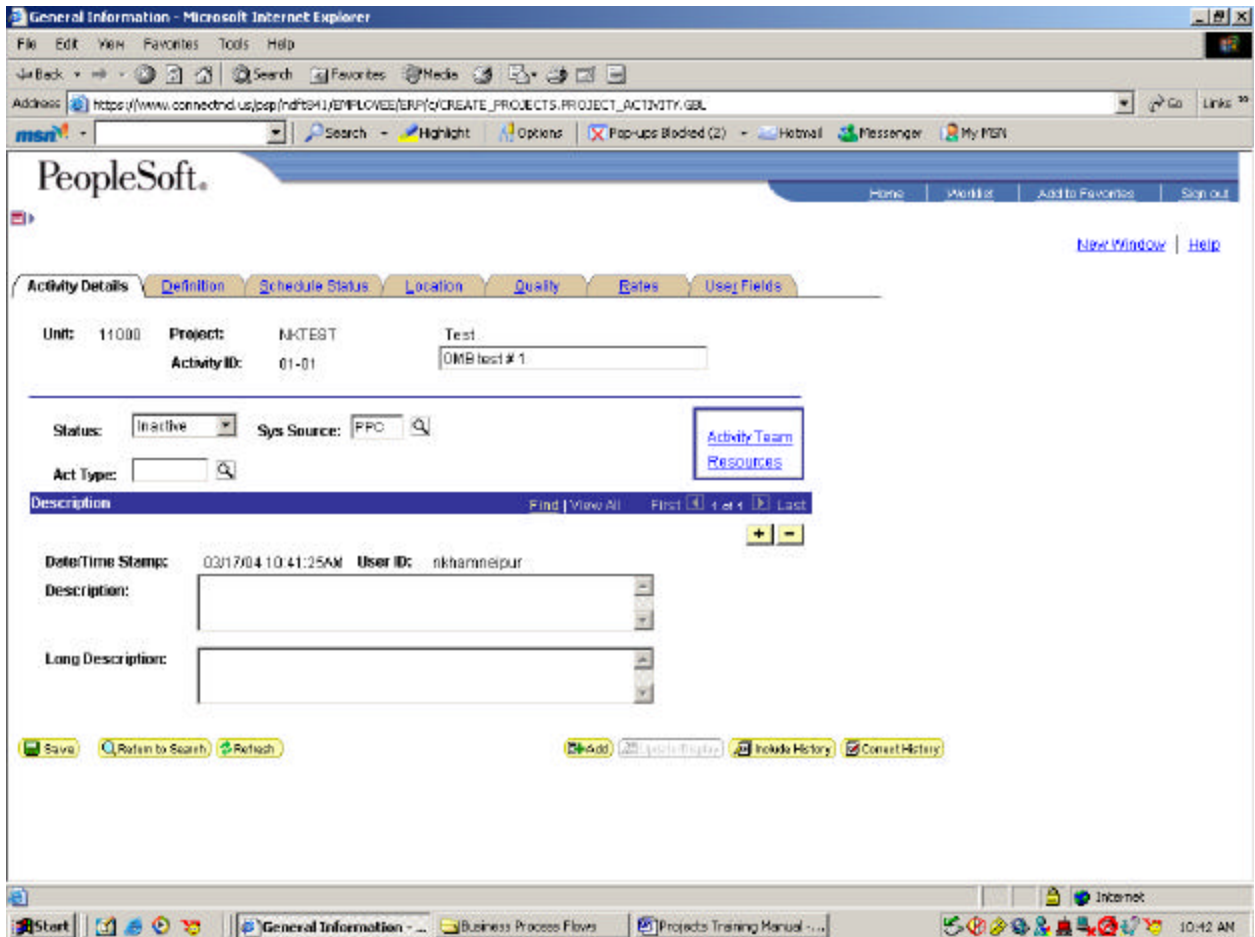
Save Return to Search Refresh Add Include History Connect History

Done

Start General Information - Business Process Flows Projects Training Manual - 10:41 AM

- Change the status to 'Inactive'.

Status: Inactive



General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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New Window Help

Activity Details Definition Schedule Status Location Quality Bates User Fields

Unit: 11000 Project: NKTEST Test
Activity ID: 01-01 OMB test # 1

Status: Inactive Sys Source: PPO

Act Type:

Activity Team Resources

Description Find View All First 1 of 1 Last

Date/Time Stamp: 03/17/04 10:41:25AM User ID: nkhamneipur

Description:

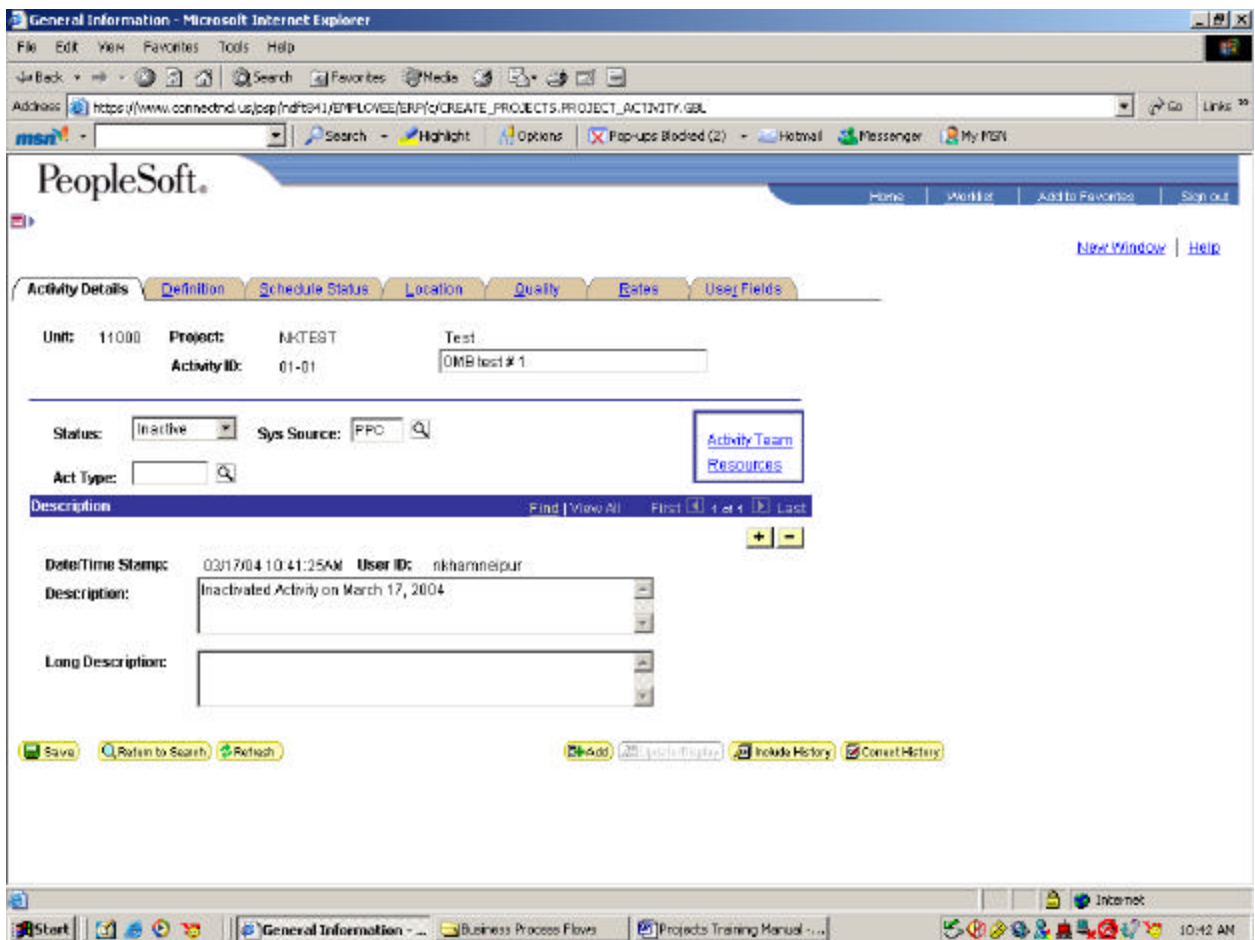
Long Description:



Save Return to Search Refresh Add Include History Connect History

Start General Information Business Process Flows Projects Training Manual 10:42 AM

Note: The status of an activity defaults to 'Active'. Change the status to Inactive when you do NOT want any subsystems to be able to send incoming information to this particular Project Activity.

- Enter the appropriate date of the 'Inactivation' in the description field.



- This is informational and will allow you to have some record as to when this project was inactivated.
- Click .
- To re-activate a project activity once it has been inactivated, you must change the status to 'Active' and add a new row to the description by clicking the add icon . Add relevant date information as to when the Project Activity was re-activated in the new description field. This way a record will be kept as to the active history related to the project activity.

General Information - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS.PRJECT_ACTIVITY.GBL

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New Window Help

Activity Details Definition Schedule Status Location Quality Dates User Fields

Unit: 11000 Project: NKTEST Test
Activity ID: 01-01 OMB test # 1

Status: Active Sys Source: PPO

Act Type:

Activity Team Resources

Description Find View All First 1 of 2 Last

Date/Time Stamp: 03/17/04 10:43:10AM User ID: nkhamneipur

Description: Activated Activity on April 17, 2004

Long Description:

Save Refer to Search Refresh Add Update Delete Include History Connect History

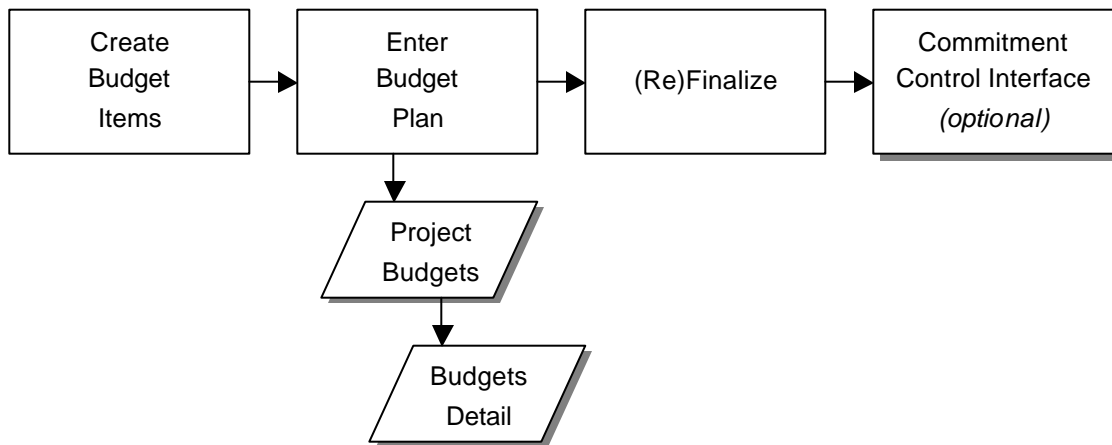
Done

Start General Information - Business Process Flows Projects Training Manual - 10:43 AM

- Click .

Project Budget

- Project Budgets allow you to define and track project expenses at a very granular level.
- Budget amounts are specified by Activity, user defined period, and user defined budget item.
- Budget items can be specified to the individual field within a resource row.
- There are three components to a Project Budget as shown in the diagram below.



Budget Items

- Budget Items define the resource transactions or groups of transactions for which you wish to budget. These Budget items represent a list of possible resource transactions to be created on the PROJ_RESOURCE table.

Setup Financials / Supply Chain > Product Related > Projects > General Options > Budget Items

Budget Items - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041_2/EMPLOYEE/ERP/c/S/STRUCTURE_PROJECTS_PC_BUD_ITEMS.GBL

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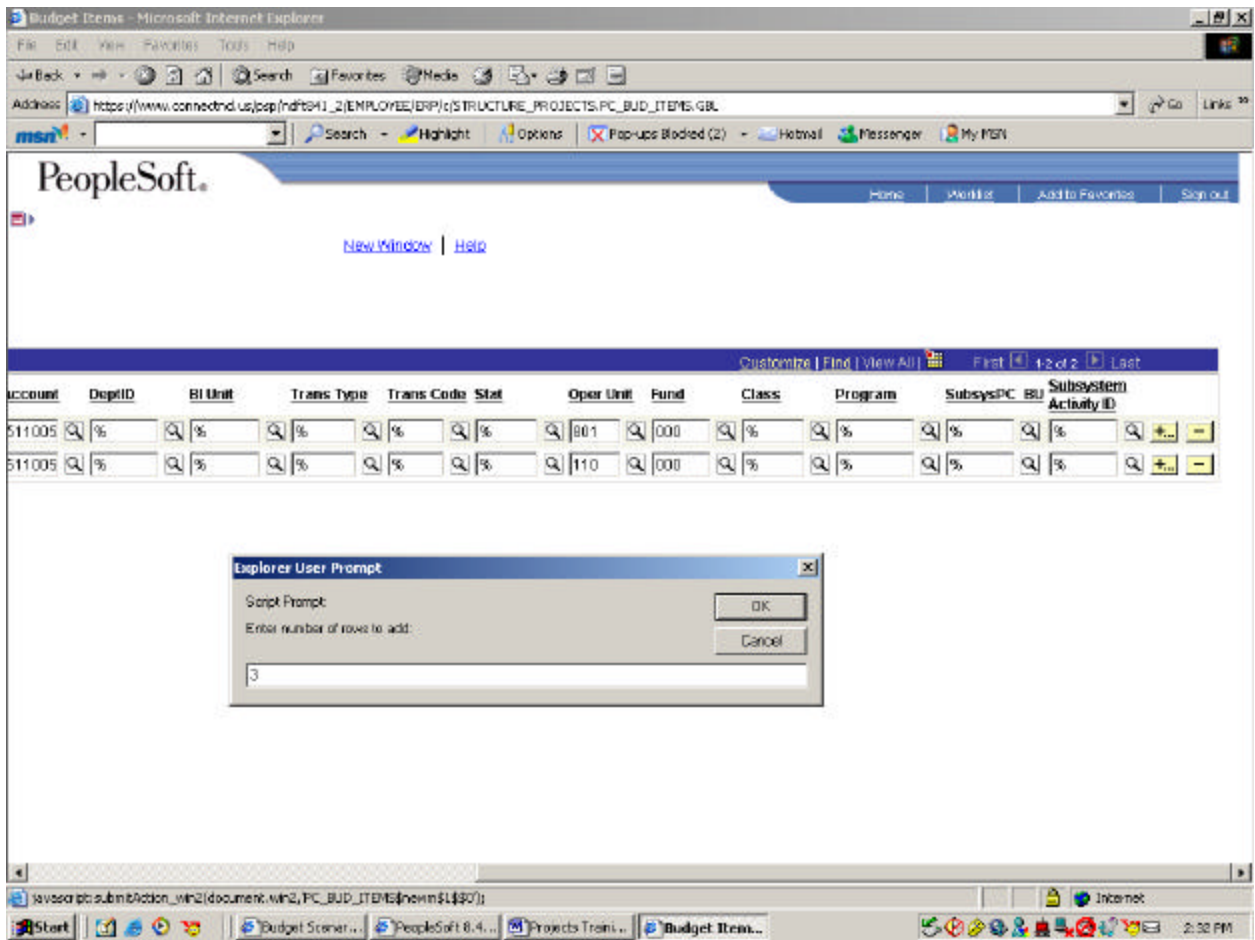
New Window Help

Budget Items

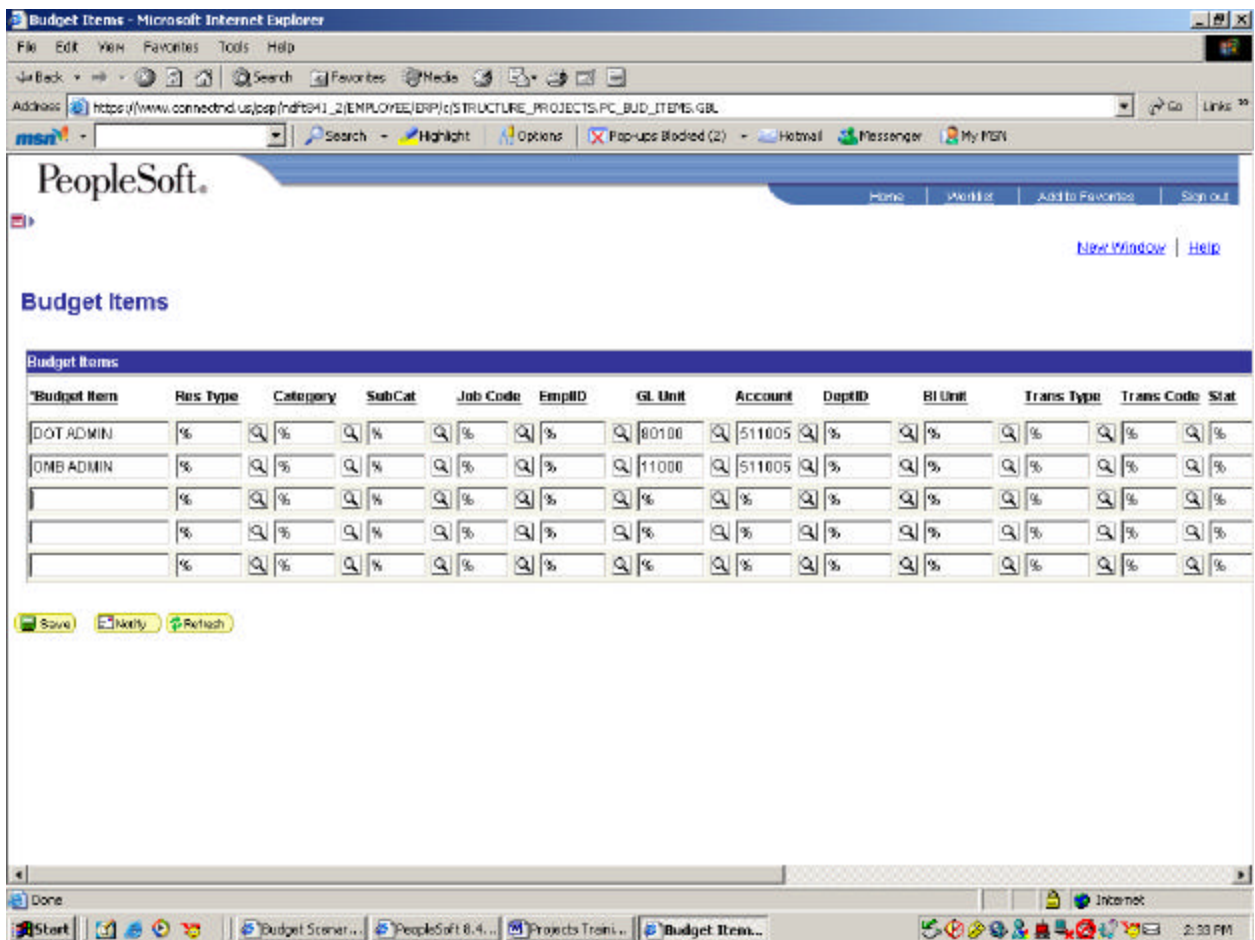
Budget Item	Res Type	Category	SubCat	Job Code	EmpID	GL Unit	Account	DeptID	BI Unit	Trans Type	Trans Code	Stat
DOT ADMIN	%	%	%	%	%	80100	511005	%	%	%	%	%
OMB ADMIN	%	%	%	%	%	11000	511005	%	%	%	%	%

Save Notify Refresh

- Budget Item: Enter an identifier for the Budget Item.
- Enter any relevant information in terms of GL Unit, Account, DeptID, etc.
- Click the add icon  to add additional rows.
- You will be prompted to enter the number of lines you want to add.




- Enter the number of rows to add and click OK.



Budget Items

Budget Item	Res Type	Category	SubCat	Job Code	EmpID	GL Unit	Account	DeptID	BI Unit	Trans Type	Trans Code	Stat
DOT ADMIN	%	%	%	%	%	80100	511005	%	%	%	%	%
OMB ADMIN	%	%	%	%	%	11000	511005	%	%	%	%	%
	%	%	%	%	%	%	%	%	%	%	%	%
	%	%	%	%	%	%	%	%	%	%	%	%
	%	%	%	%	%	%	%	%	%	%	%	%

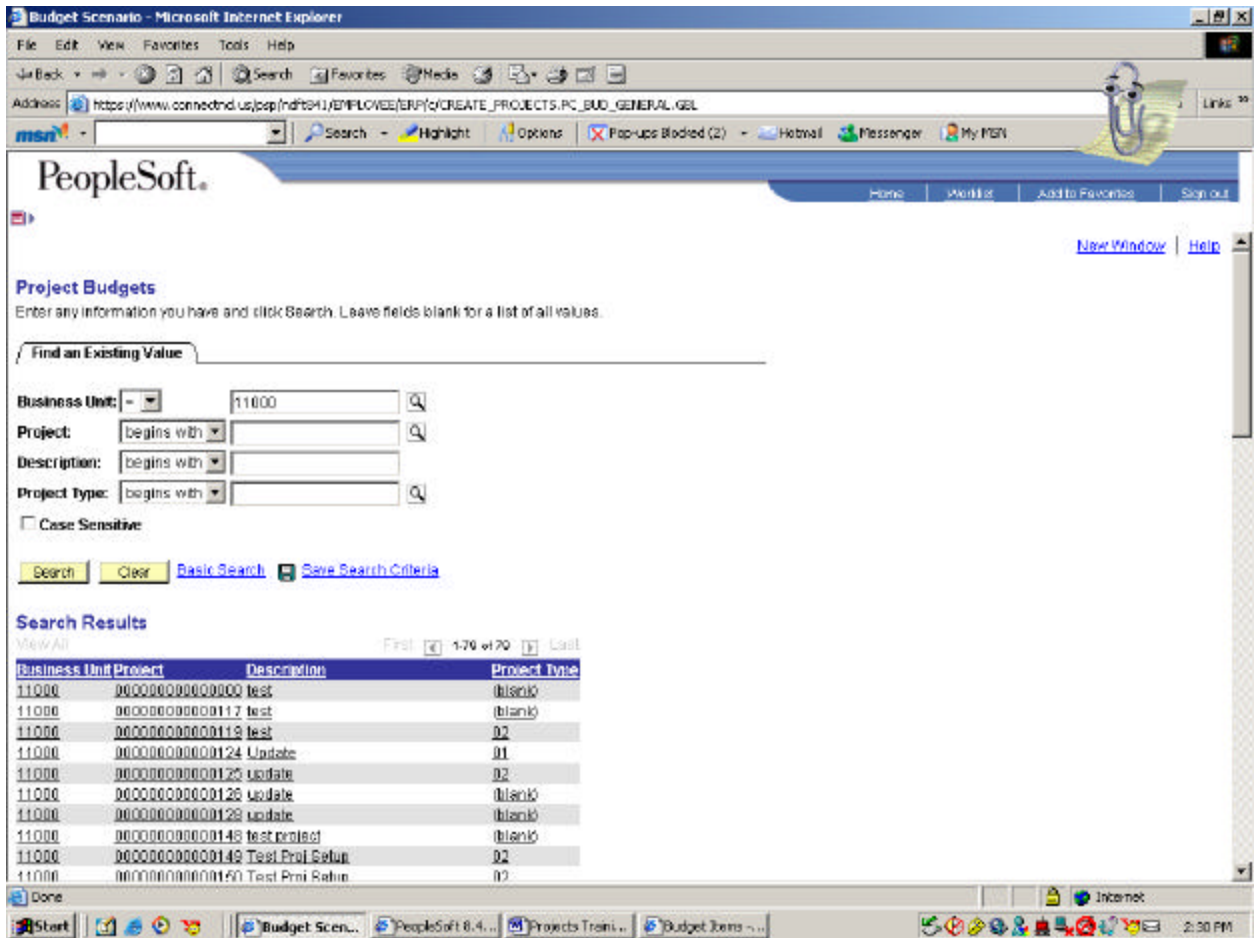
Save Modify Refresh

- Budget Item: Enter an identifier for the Budget Item.
- Enter any relevant information in terms of GL Unit, Account, DeptID, etc.
- Click .

Budget Scenario & Budget Detail


- The Budget Scenario, also called the Budget Plan, defines the framework for the budget. You will define the type and number of periods over which you will define a budget. The Budget Detail page will pre-populate the number of budget periods you specified on the Project Budgets page.


Projects > Budgeting > Budget Scenario




Project Budgets
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit: 

Project: 

Description:



Project Type: 

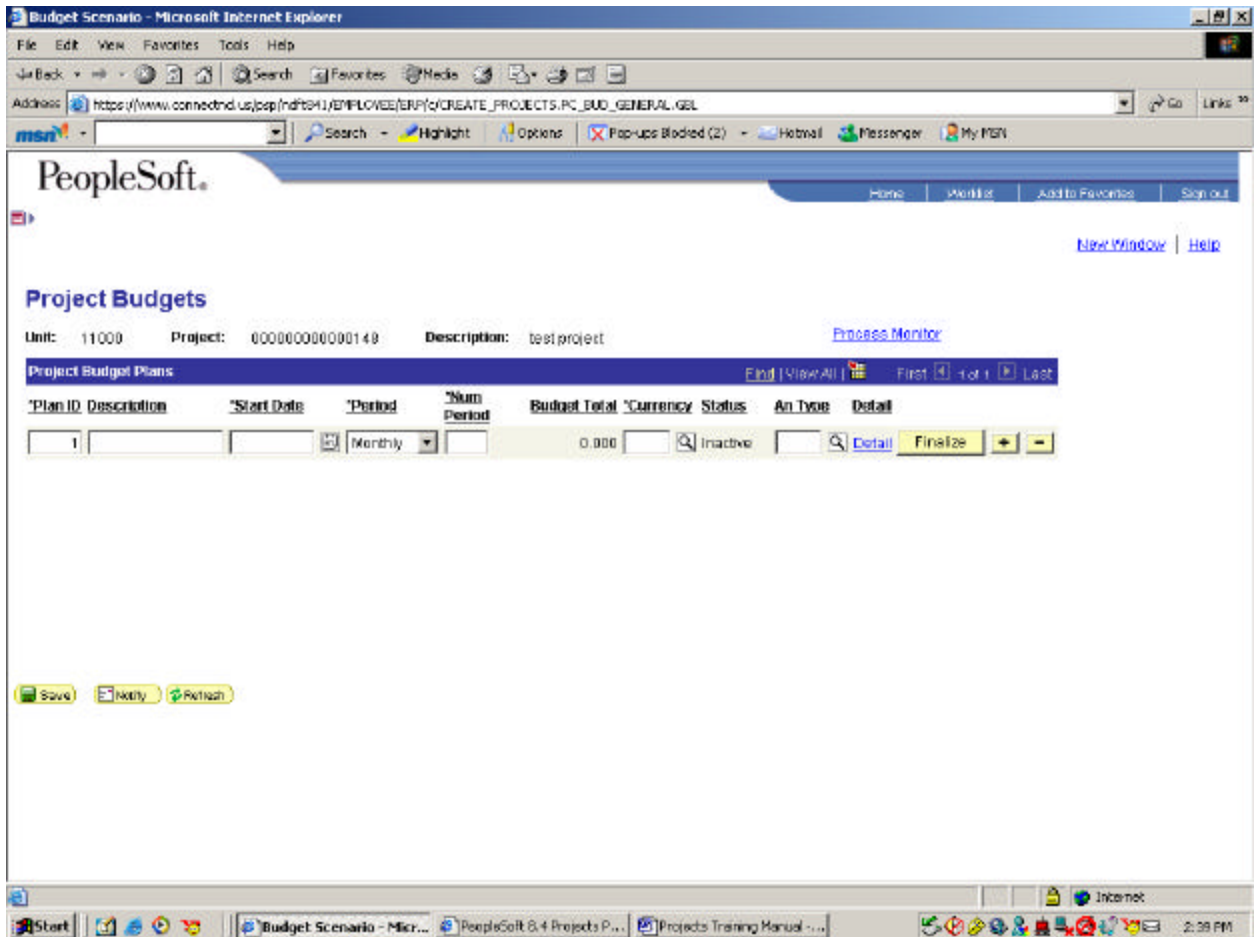
☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Search Results
View All First Last

Business Unit	Project	Description	Project Type
11000	000000000000000000	test	(blank)
11000	00000000000112	test	(blank)
11000	00000000000119	test	02
11000	00000000000124	update	01
11000	00000000000125	update	02
11000	00000000000126	update	(blank)
11000	00000000000128	update	(blank)
11000	00000000000148	test retest	(blank)
11000	00000000000149	Test Proj Setup	02
11000	00000000000150	Test Pmi Setup	02

- Business Unit: Project Business Unit. Click on the magnifying glass icon  to see a list of valid values.
- Project: Project ID. Click on the magnifying glass icon  to see a list of valid values.
- Click .
- Select the appropriate Project to Budget.



Project Budgets

Unit: 11000 Project: 00000000000140 Description: test project [Process Monitor](#)

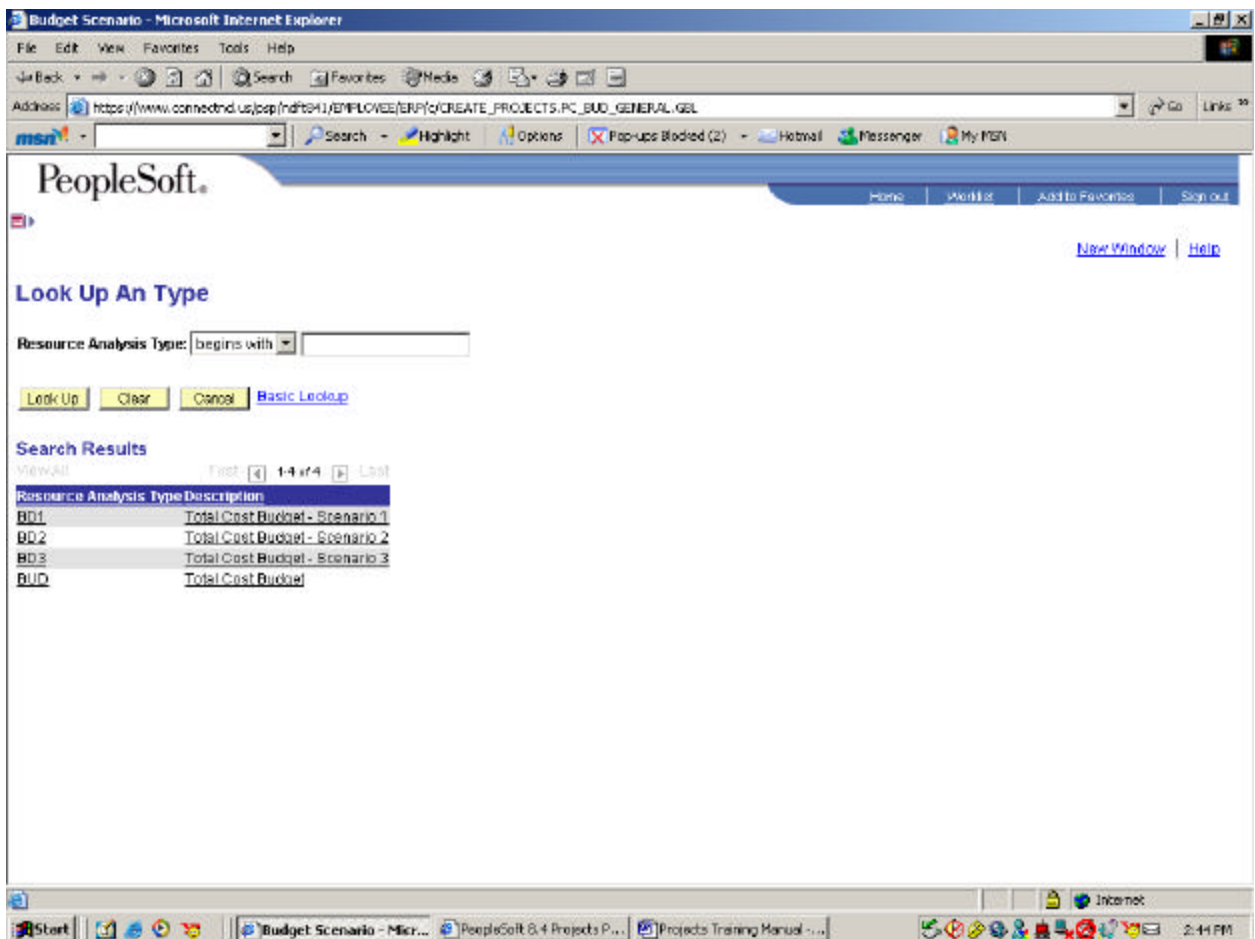
Project Budget Plans [Find](#) [View All](#) First [4](#) of 1 Last

Plan ID	Description	Start Date	Period	Num Period	Budget Total	Currency	Status	An Type	Detail
1			Monthly		0.000		Inactive		Detail Finalize

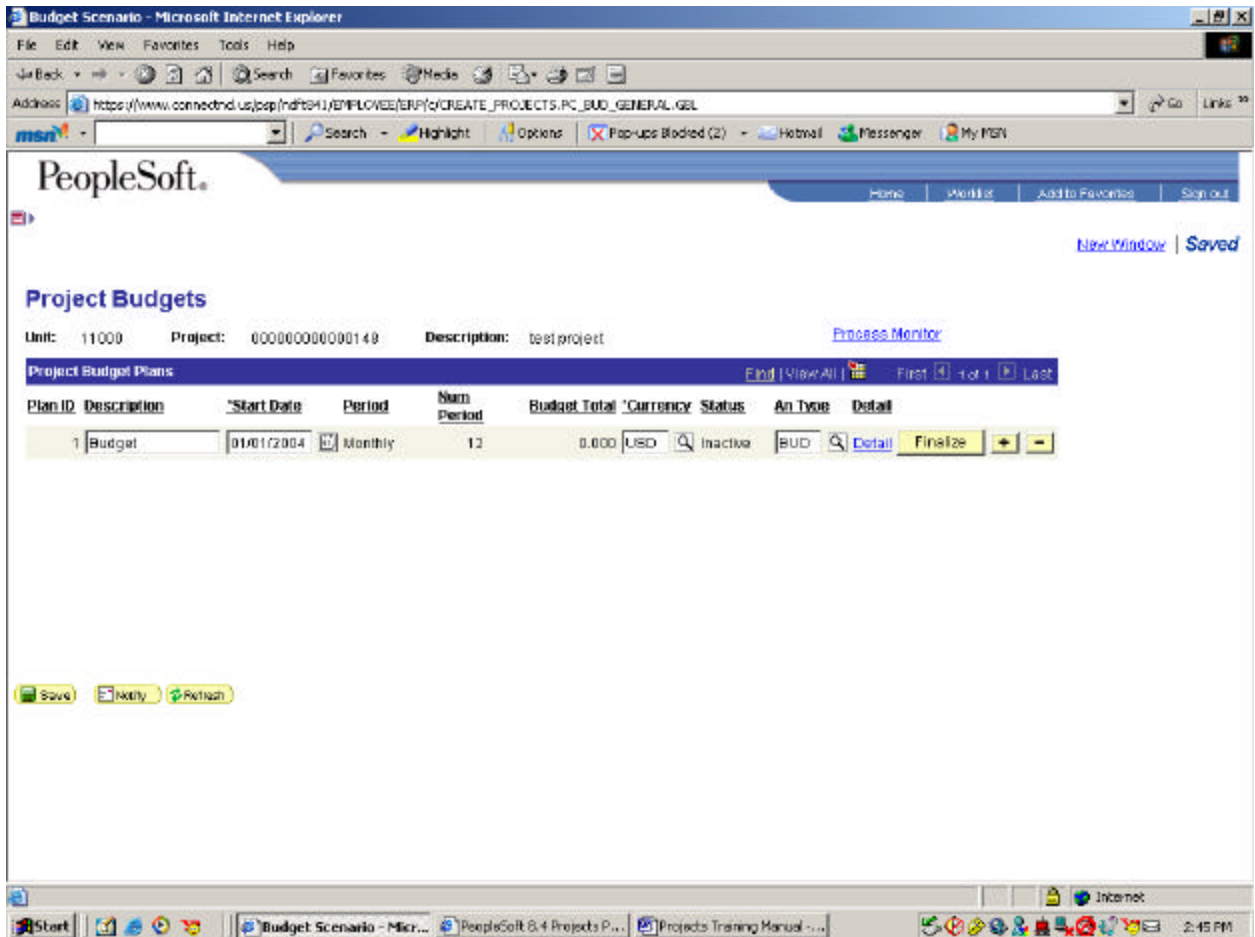
[Save](#) [Modify](#) [Refresh](#)

- Plan ID: Identifies a budget plan for a given project. Once the plan is saved, this field is display only.
- Description: Budget Description.
- Start Date: Start date for the Budget period.
- Period: The budget period identifies the interval in which the budget plan will be tracked.
- Num Period: Defines the number of periods for the budget plan. The maximum allowed is 52, regardless of the value in the Period field.
- Currency: USD
- Status: Plan status is a display only field and defaults to *Inactive*.
- The plan status is changed to *Active* when the finalization process is completed successfully.

- Only one budget plan may be active at any given time.
- If the user changes a budget plan after it has been finalized, the user must press the Re-Finalize button to send updated information to PROJ_RESOURCE.
- If the user presses Save instead of Re-Finalize, the status of the budget plan will be changed to *Modified*. This indicates that the budget plan has been modified and is no longer in sync with PROJ_RESOURCE information. In such cases, the budget plan should be re-finalized.
- Analysis Type: Analysis type used when writing rows to PROJ_RESOURCE during the finalization process. Choices are:



- Click  .



Project Budgets

Unit: 11000 Project: 000000000000149 Description: test project [Process Monitor](#)

Project Budget Plans [End View All](#) [First](#) [1 of 1](#) [Last](#)

Plan ID	Description	Start Date	Period	Num Period	Budget Total	Currency	Status	An Type	Detail
1	Budget	01/01/2004	Monthly	12	0.000	USD	Inactive	BUD	Detail Finalize + -

[Save](#) [Modify](#) [Refresh](#)

- Click on the [Detail](#) hyperlink: Link to the Budget Detail page for the given plan.

Budget Scenario - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf0241/EMPLOYEE/EMP/q/CREATE_PROJECTS.PC_BUD_GENERAL.GEL

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Budget Detail

Unit: 11000 Project: 000000000000140 Description: test project [Activity General](#)

Plan ID: 1 Description: Budget Process Monitor Budget Items Finalize

Start Date: 01/01/2004 Period: Monthly Currency: USD

Budget by Activity

Activity ID: [Modify Budget](#)

[Return to Project Budgets](#)

[Save](#) [Notify](#) [Refresh](#)

Start Budget Scenario - Micr... PeopleSoft 6.4 Projects P... Projects Training Manual - ... 2:47 PM

- Choose an Activity ID. Click on the magnifying glass icon to see a list of valid values.

Budget Scenario - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS_PC_BUD_GENERAL.GEL

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Budget Detail

Unit: 11000 Project: 00000000000149 Description: test project [Activity General](#)

Plan ID: 1 Description: Budget Process Monitor Budget Items Finalize

Start Date: 01/01/2004 Period: Monthly Currency: USD

Budget by Activity

Activity ID: 00000000000001 [Modify Budget](#)

[Return to Project General](#)

Save Notify Refresh

Done

Start Budget Scenario - Micr... PeopleSoft 8.4 Projects P... Projects Training Manual - ... 2:49 PM

- Click the [Modify Budget](#) button.

Budget Scenario - Microsoft Internet Explorer

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Budget Detail

Unit: 11000 Project: 000000000000140 Description: test project [Activity General](#)

Plan ID: 1 Description: Budget [Process Monitor](#) [Budget Items](#) [Finalize](#)

Start Date: 01/01/2004 Period: Monthly Currency: USD

Budget by Activity

Activity ID: 000000000000001 Description: Activity 1 [Clear](#) [Copy](#)

Periods: 1 - 6 [7-12](#)


Budget Item	1	2	3	4	5	6	Item Total
							0.000
Total	0.000	0.000	0.000	0.000	0.000	0.000	0.000

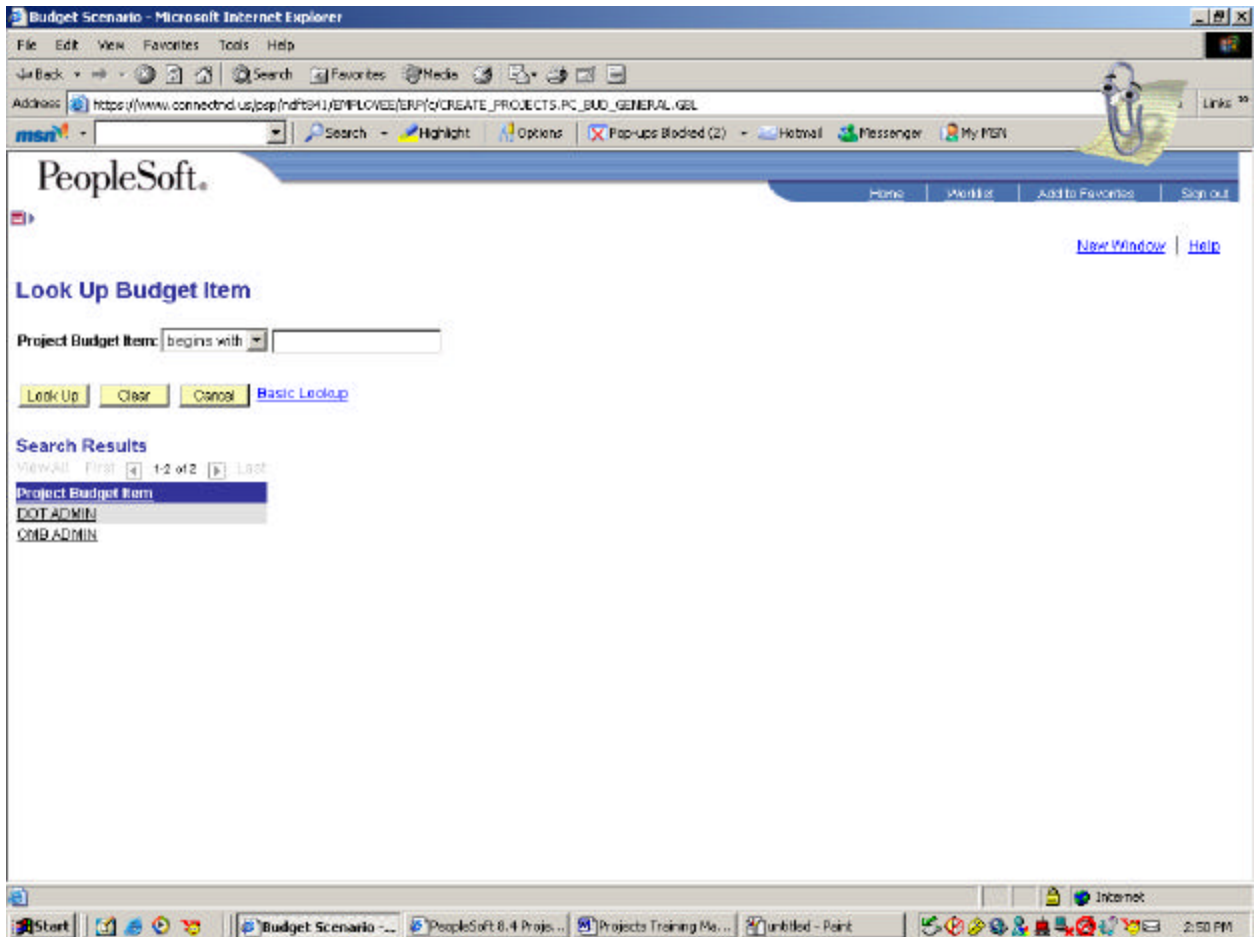
[Return to Project General](#)

[Save](#) [Notify](#) [Refresh](#)

Done

Start Budget Scenario - ... PeopleSoft 8.4 Proj... Projects Training Ma... Unlitled - Paint Internet 2:50 PM

- Select the appropriate Budget Item. Click on the magnifying glass icon  to see a list of valid values.



Note: These Budget Items were the ones setup previously.

Budget Scenario - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Budget Detail

Unit: 11000 Project: 000000000000140 Description: test project [Activity General](#)

Plan ID: 1 Description: Budget [Process Monitor](#) [Budget Items](#) [Finalize](#)

Start Date: 01/01/2004 Period: Monthly Currency: USD

Budget by Activity

Activity ID: 000000000000001 Description: Activity 1 [Clear](#) [Copy](#)

Periods: 1 - 8 [7-12](#)

Budget Item	1	2	3	4	5	6	Item Total
OMB ADMIN							0.000
Total	0.000	0.000	0.000	0.000	0.000	0.000	0.000

[Return to Project General](#)

[Save](#) [Notify](#) [Refresh](#)

Start Budget Scen... PeopleSoft 8.4... Projects Train... Unlabeled - Paint 2:52 PM

Note: There are 12 periods to use for budgeting because we specified on the Budget Scenario page that we wanted to budget for 12 monthly periods.

- Enter the budget dollar amount for each period.

Budget Scenario - Microsoft Internet Explorer

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New Window Help

Budget Detail

Unit: 11000 Project: 00000000000149 Description: test project [Activity General](#)

Plan ID: 1 Description: Budget [Process Monitor](#) [Budget Items](#) [Finalize](#)

Start Date: 01/01/2004 Period: Monthly Currency: USD

Budget by Activity

Activity ID: 00000000000001 Description: Activity 1 [Clear](#) [Copy](#)

Periods: 1 - 6 [7-12](#)

Budget Item	1	2	3	4	5	6	Item Total
OMB ADMIN	1000	1000	1000	1000	1000	1000	6000
Total:	0.000	0.000	0.000	0.000	0.000	0.000	0.000

[Return to Project General](#)

[Save](#) [Notify](#) [Refresh](#)

- Click on the hyperlink to access the additional periods.

Budget Scenario - Microsoft Internet Explorer

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Budget Detail

Unit: 11000 Project: 000000000000140 Description: test project [Activity General](#)

Plan ID: 1 Description: Budget [Process Monitor](#) [Budget Items](#) [Finalize](#)

Start Date: 01/01/2004 Period: Monthly Currency: USD

Budget by Activity

Activity ID: 00000000000001 Description: Activity 1 [Clear](#) [Copy](#)

Periods: 1-8 7-12

Budget Item	Z	8	9	10	11	12	Item Total
OMB ADMIN	2000	2000	2000	2000	2000	2000	6,000.000
Total	0.000	0.000	0.000	0.000	0.000	0.000	6,000.000

[Return to Project General](#)

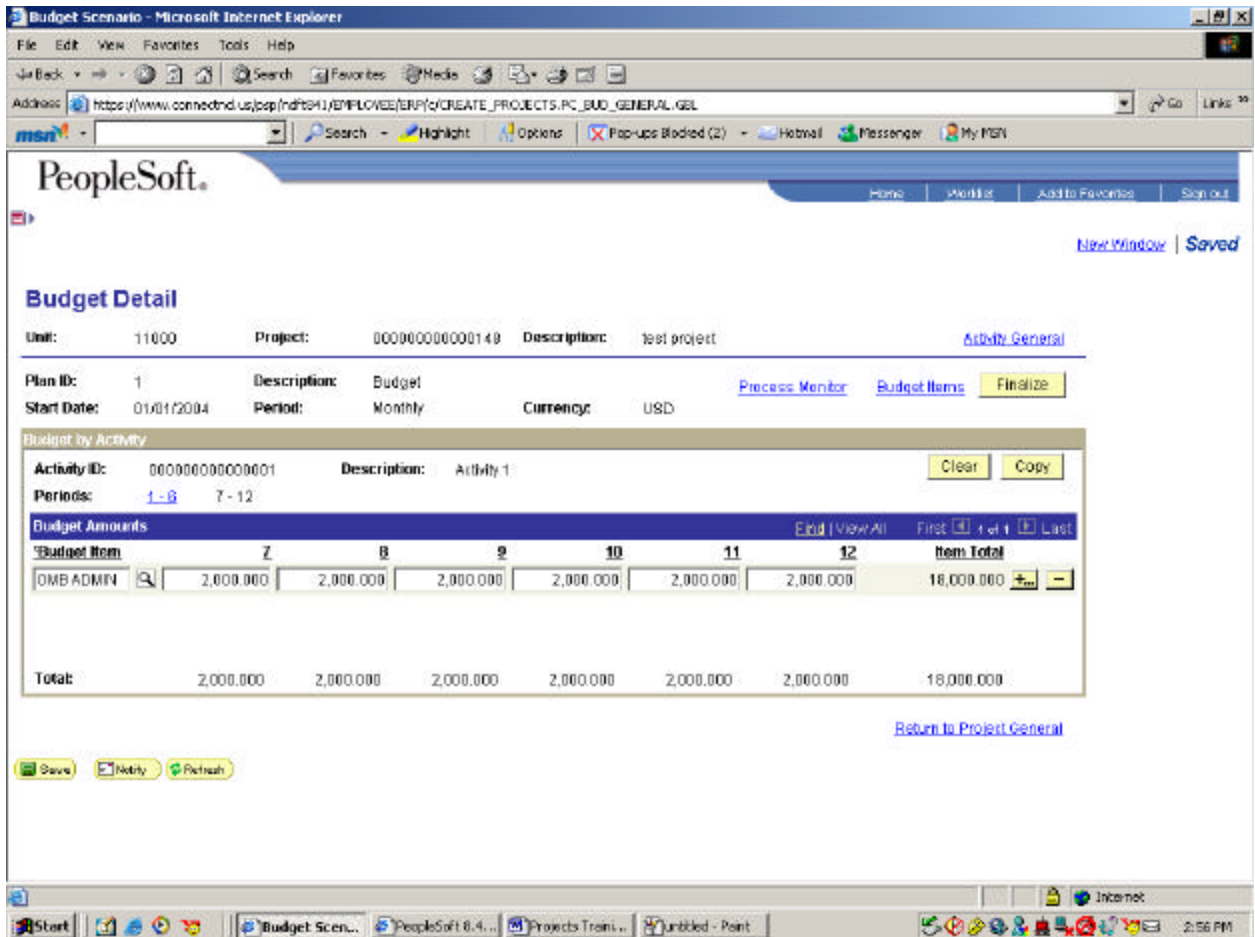
[Save](#) [Notify](#) [Refresh](#)

Done

Start Budget Scen... PeopleSoft 8.4... Projects Train... Unlabeled - Paint

Internet 2:54 PM

- Click [Save](#).



Budget Detail

Unit: 11000 Project: 00000000000140 Description: test project [Activity General](#)

Plan ID: 1 Description: Budget [Process Monitor](#) [Budget Items](#) [Finalize](#)

Start Date: 01/01/2004 Period: Monthly Currency: USD

Budget by Activity

Activity ID: 00000000000001 Description: Activity 1 [Clear](#) [Copy](#)

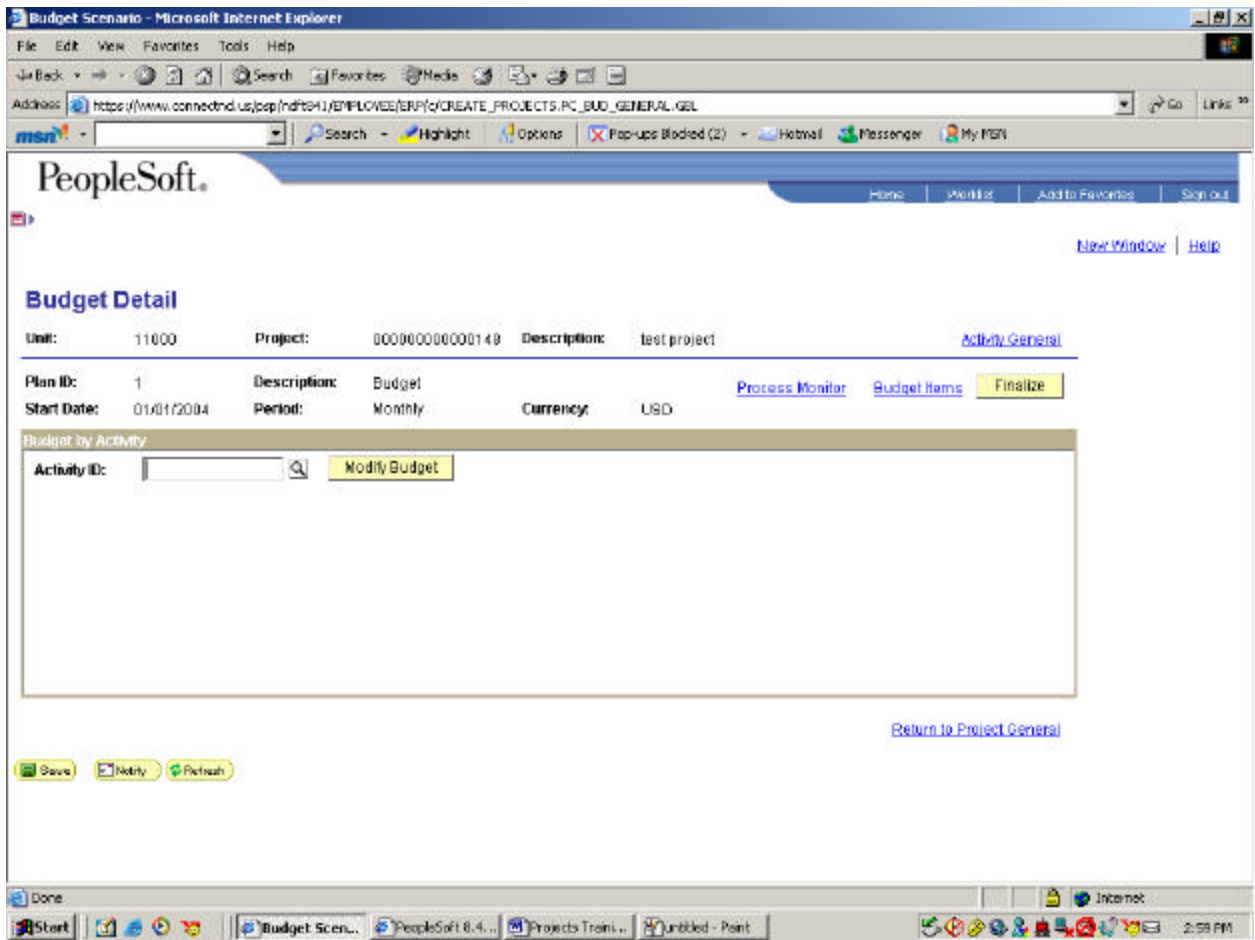
Periods: 1-8 7-12

Budget Item	1	2	3	4	5	6	7	Item Total
OMB ADMIN	2,000,000	2,000,000	2,000,000	2,000,000	2,000,000	2,000,000	2,000,000	18,000,000
Total:	2,000,000	2,000,000	2,000,000	2,000,000	2,000,000	2,000,000	2,000,000	18,000,000

[Return to Project General](#)

[Save](#) [Notify](#) [Refresh](#)

- Click the [Activity General](#) hyperlink to be navigated to the Activity General search page for the project. There the user can view or create an activity on the Activity Details page.
- Click the [Budget Item](#) hyperlink to create a new budget item on the Budget Items page.
- Click [Clear](#) to clear the Budget Amounts, the amounts will not be saved unless Save was clicked first.
- To add or modify budget amounts for another activity, click [Save](#) to save the current Budget Amounts, click [Clear](#), and enter the activity ID to display the budget amounts to be changed.



Budget Scenario - Microsoft Internet Explorer

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Back Forward Stop Search Favorites Media Print

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Budget Detail

Unit: 11000 Project: 000000000000140 Description: test project [Activity General](#)

Plan ID: 1 Description: Budget [Process Monitor](#) [Budget Items](#) [Finalize](#)

Start Date: 01/01/2004 Period: Monthly Currency: USD

Budget by Activity

Activity ID: [Modify Budget](#)


[Return to Project General](#)

[Save](#) [Notify](#) [Refresh](#)

Done

Start Budget Scen... PeopleSoft 6.4... Projects Train... Unjibled - Paint

Internet 2:59 PM

- Choose an Activity ID. Click on the magnifying glass icon  to see a list of valid values.

Budget Scenario - Microsoft Internet Explorer

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Budget Detail

Unit: 11000 Project: 00000000000149 Description: test project [Activity General](#)

Plan ID: 1 Description: Budget Process Monitor Budget Items Finalize

Start Date: 01/01/2004 Period: Monthly Currency: USD

Budget by Activity

Activity ID: 00000000000002 [Modify Budget](#)

[Return to Project General](#)

Save Notify Refresh

Done Start Budget Scen... PeopleSoft 8.4... Projects Trans... Jumbled - Paint 3:01 PM

- Click the **Modify Budget** button.

Budget Scenario - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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New Window Help

Budget Detail

Unit: 11000 Project: 000000000000140 Description: test project [Activity General](#)

Plan ID: 1 Description: Budget [Process Monitor](#) [Budget Items](#) [Finalize](#)

Start Date: 01/01/2004 Period: Monthly Currency: USD

Budget by Activity

Activity ID: 00000000000002 Description: Activity 2 [Clear](#) [Copy](#)

Periods: 1 - 6 [7-12](#)

Budget Item	1	2	3	4	5	6	Item Total
							0.000
Total	0.000	0.000	0.000	0.000	0.000	0.000	0.000

[Return to Project General](#)

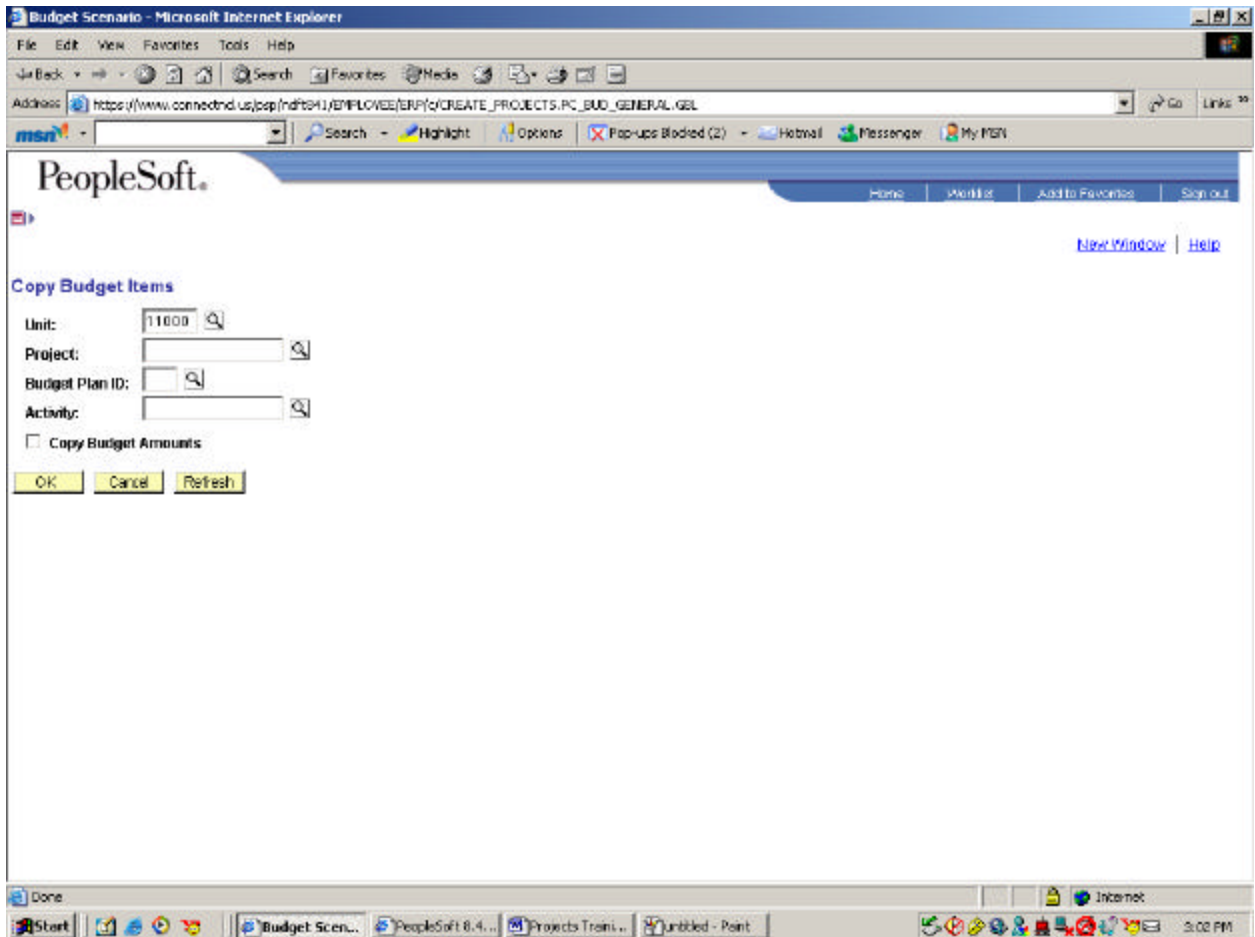
[Save](#) [Notify](#) [Refresh](#)





Done

Start Budget Scen... PeopleSoft 8.4... Projects Train... Jumbled - Paint

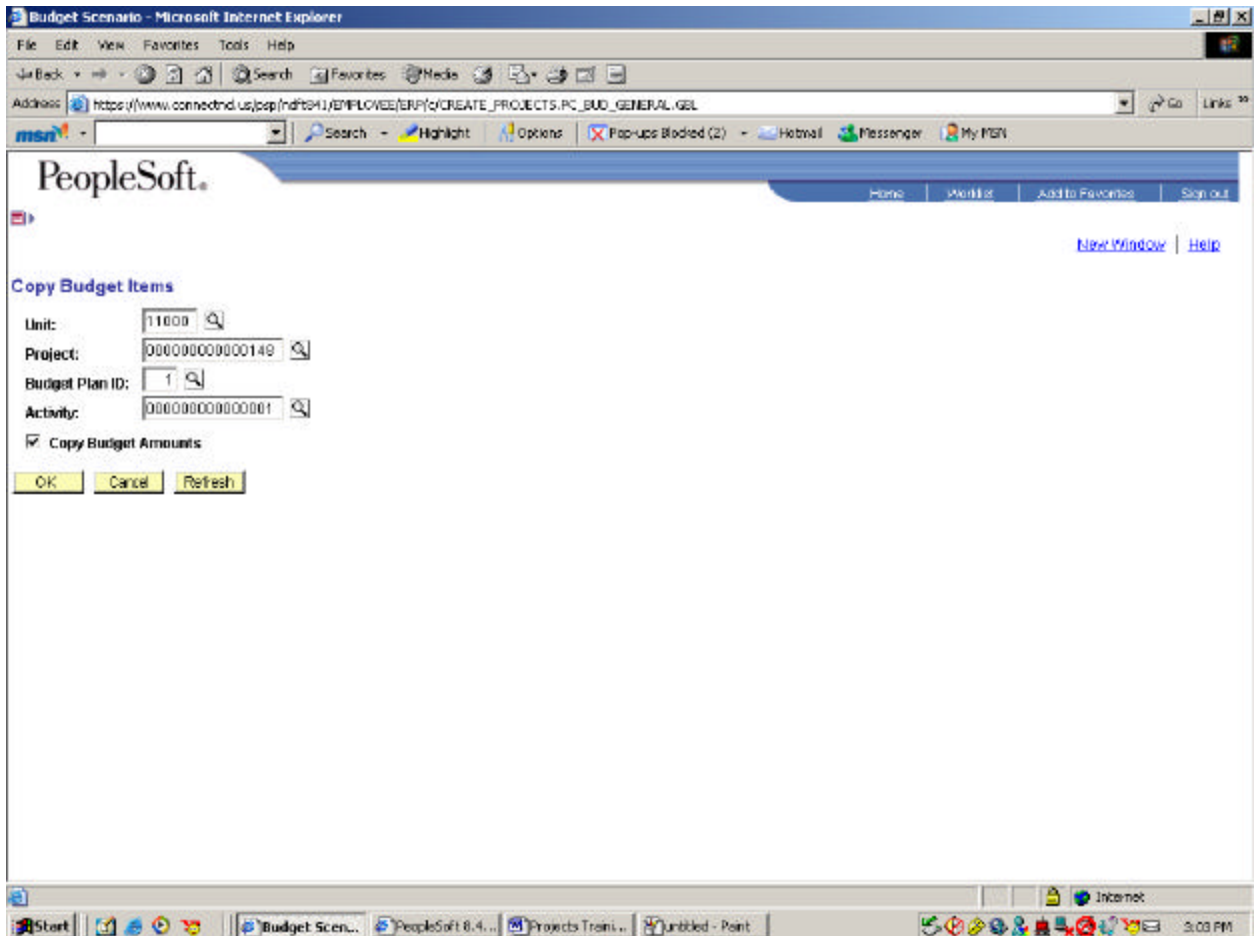
Internet 3:02 PM

- Click [Copy](#) to allow copying a budget item from any previously saved Budget Detail page.



- Business Unit: Projects Business Unit: Click on the magnifying glass icon  to see a list of valid values.
- Project: Project ID: Click on the magnifying glass icon  to see a list of valid values.
- Budget Plan ID: Plan ID from the Budget Scenario page. Click on the magnifying glass icon  to see a list of valid values.
- Activity: Activity ID. Click on the magnifying glass icon  to see a list of valid values.
- Copy Budget Amounts: Check the box.
- The following restrictions apply when copying budget items:
 - The currency and the number of budget periods of the plan being copied must be the same as the current plan before amounts can be copied.

- A budget item (and its corresponding amounts, if applicable) will not be copied if an item with the same name or definition has already been specified for the current activity.
- Identically defined budget items must have the same name across all activities in the same budget plan. If not, the budget item may be renamed when copied from one budget plan to another.



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Copy Budget Items

Unit:

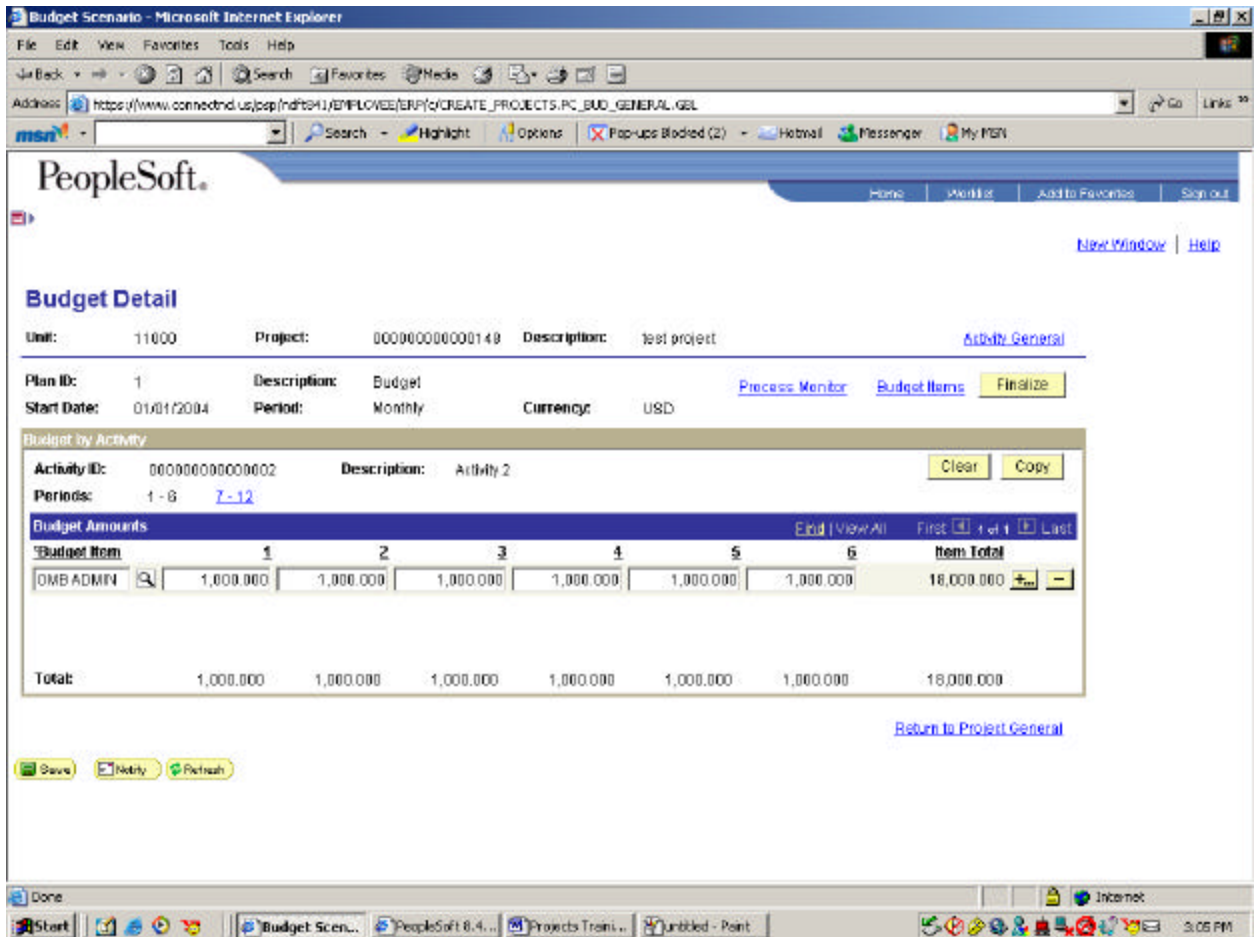
Project:

Budget Plan ID:

Activity:

☒ Copy Budget Amounts

- Click .



Budget Detail

Unit: 11000 Project: 00000000000149 Description: test project [Activity General](#)

Plan ID: 1 Description: Budget Start Date: 01/01/2004 Period: Monthly Currency: USD [Process Monitor](#) [Budget Items](#) [Finalize](#)

Budget by Activity

Activity ID: 00000000000002 Description: Activity 2 [Clear](#) [Copy](#)

Periods: 1 - 6 [7-12](#)

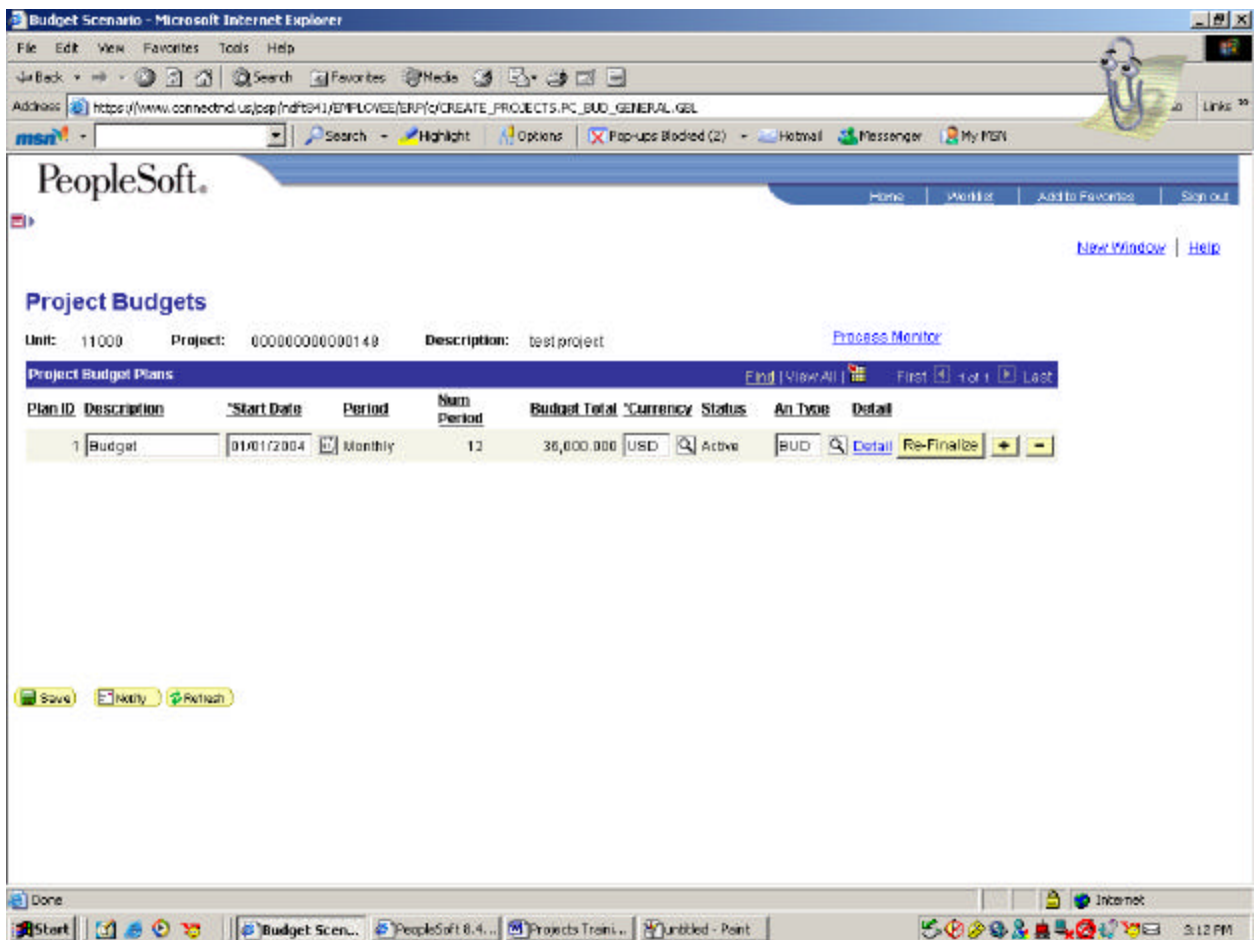
Budget Item	1	2	3	4	5	6	Item Total
OMB ADMIN	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	18,000,000
Total:	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	18,000,000

[Return to Project General](#)

[Save](#) [Notify](#) [Refresh](#)

- Click [Finalize](#) to save the data and initiate the finalization process for a completed budget plan.

Note: If the budget plan is already active, the button will read *Re-Finalize*. Click Re-Finalize after making changes to an active budget.



Finalize

- On the Budget Detail page, click Finalize to finalize a project's budget plan. The finalization process sets the budget plan's status to *Active*. All other plans for the same project are *Inactive*. Only one budget plan may be finalized per project, although that plan may be re-finalized if any changes are made to it.
- Period start and end dates are defined for the plan that is being finalized. These dates are maintained in the PC_BUD_CAL table. The purpose of this calendar is to report budgets versus costs by period. The Start Date of the first period will always be the budget start date.

Re-Finalization

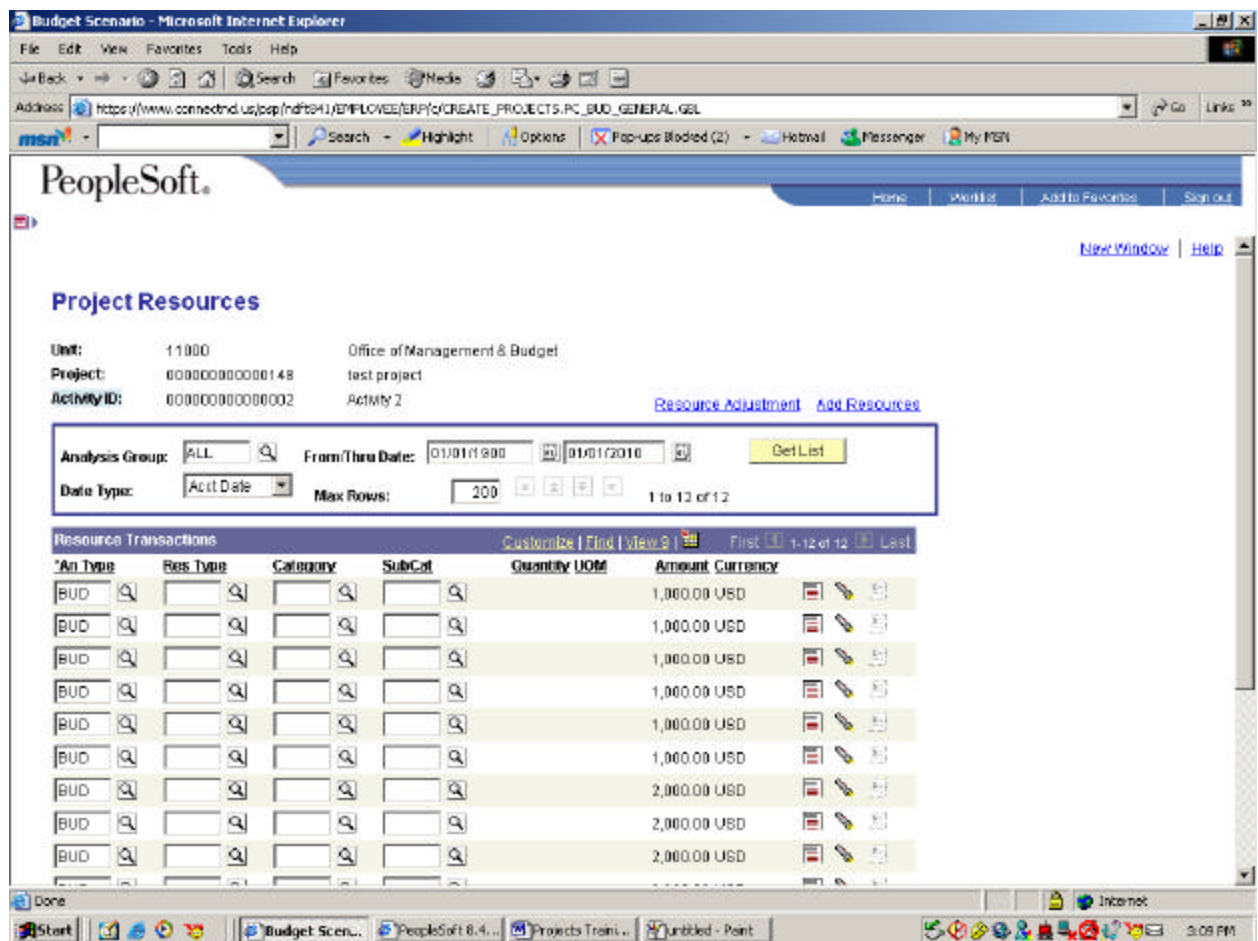
- If the user saves a budget plan without pressing the Re-Finalize button, budget information is no longer synchronized with the PROJ_RESOURCE rows, and the plan status is changed to *Modified*, indicating that the budget plan was changed and not re-finalized.

- If the analysis type is changed and the budget plan is re-finalized, PROJ_RESOURCE rows from the previous finalization process are not deleted. The updated budget data is written to PROJ_RESOURCE with the new analysis type. This allows the user to perform budget versus cost variance analysis for different budget plans as long as the analysis types are in different budget analysis groups. The user can run the Project Delete utility to delete any obsolete PROJ_RESOURCE rows.

Project Budget Resources

- Resource rows are created from the Budget Detail page, with the Analysis Type that you specified.

Projects > Resources > General Information



Project Resources

Unit: 11000 Office of Management & Budget
 Project: 000000000000148 test project
 Activity ID: 000000000000002 Activity 2

[Resource Adjustment](#) [Add Resources](#)

Analysis Group: ALL From/Thru Dates: 01/01/1900 01/01/2010 [Get List](#)
 Date Type: Act Date Max Rows: 200 1 to 12 of 12

Analysis Type	Resource Type	Category	SubCat	Quantity	UOM	Amount	Currency
BUD						1,000.00	USD
BUD						1,000.00	USD
BUD						1,000.00	USD
BUD						1,000.00	USD
BUD						1,000.00	USD
BUD						1,000.00	USD
BUD						2,000.00	USD
BUD						2,000.00	USD
BUD						2,000.00	USD

- Click on the Resource Detail icon to view additional Chartfield information on the BUD analysis type.

Budget Scenario - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/CREATE_PROJECTS_PC_BUD_GENERAL.GEL

msn Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My MSN

PeopleSoft® Home World of Add to Favorites Sign out

Resource Detail

Unit: 11000 Office of Management & Budget
Project: 00000000000146 test project
Activity: 00000000000002 Activity 2

Resources Find First 1 of 12 Last

Descr: [Show All Resource Details](#)

'An Type	Res Type	Category	SubCat	GL Unit	Quantity	UOM	Amount	Currency
BUD				11000			1000.00	USD

Rate Type: CRRNT Distribution Status: ☐ AM Unit:
Cur Effdt: 03/17/2004 PC Status: ☐ Profile ID:
Trans Date: 03/17/2004 BI Distrib: ☐ Asset ID:
Acctg Date: 01/01/2004 From GL Unit: 11000 Cost Type:
Ledger Group:

Trans Code:
Trans Type:
Proj Currency: USD
Project Amount: 1000.00

[Customize](#)

Account	Oper Unit	Fund	DeptID	Program	Class	SubsysPC BU	SubsysActiv ID	Statistics Code
511005	110	000						

[Return to Project Resources](#)

Save Return to Search Notify Refresh

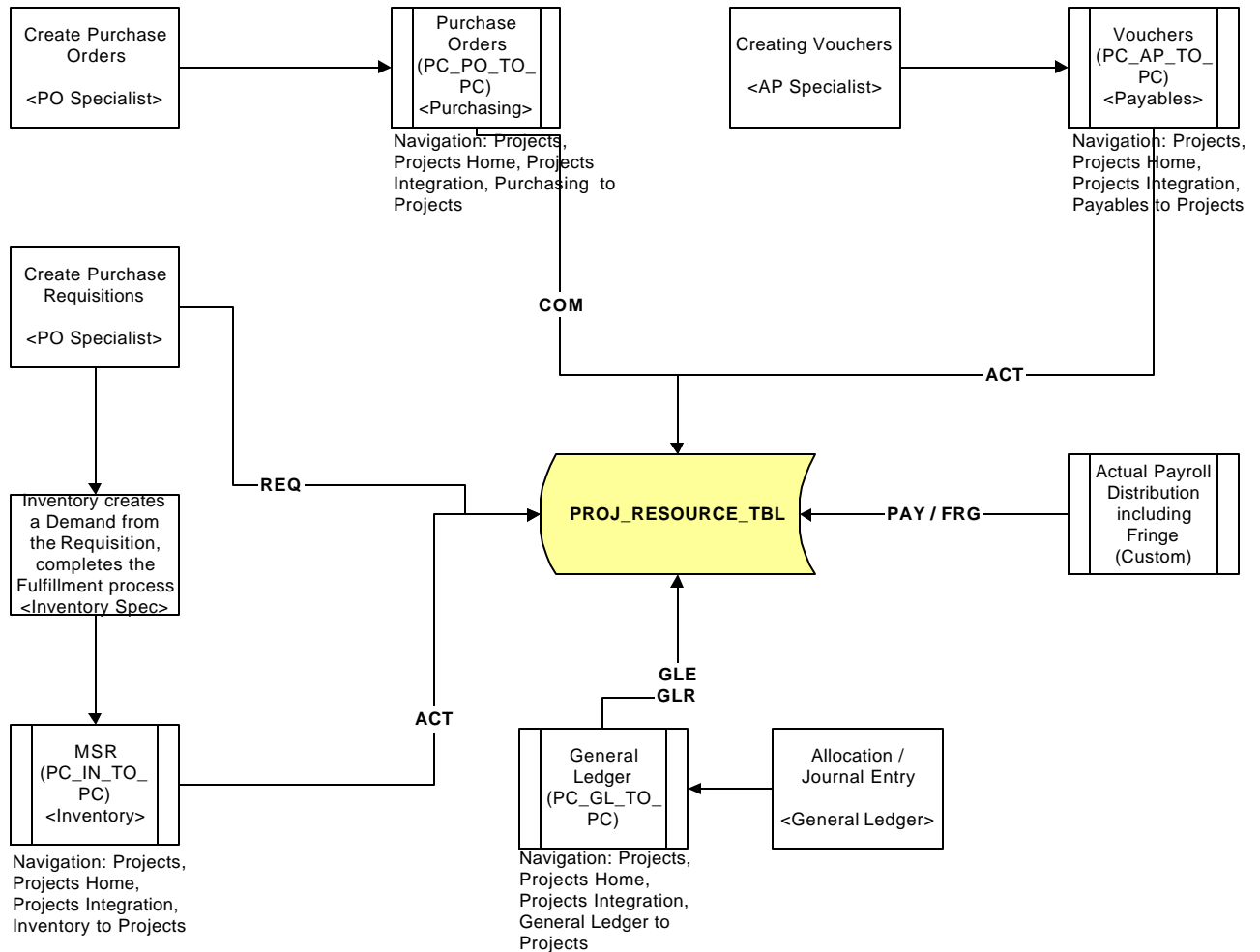
Update Budgets Connect History

Start Budget Scen... PeopleSoft 8.4... Projects Trans... Jumbled - Print 3:10 PM

Note: These Chartfields default from the Budget Item specified for the Activity when budgeting.

PeopleSoft Projects Integration

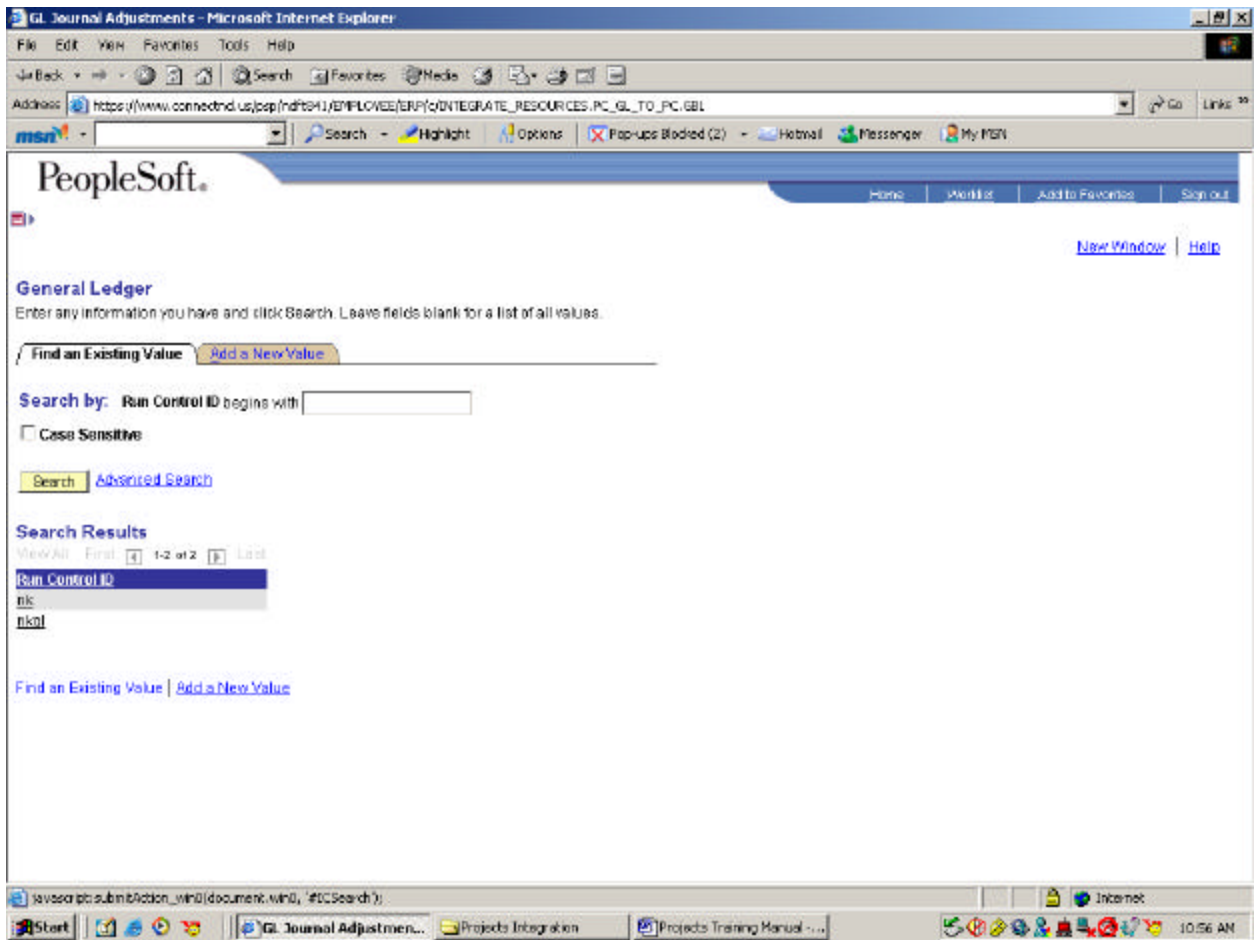
- Integration of Projects to other PeopleSoft will be maintained through nightly automatic processes.
- OMB will setup these automated processes as part of the PeopleSoft Implementation.
- The following processes can however be run at any time by a user.
 - Purchasing will create 'COM' analysis type rows for commitments made by purchase orders.
 - Accounts Payable will create 'ACT' analysis type row for actual costs paid on purchases.
 - Payroll & the Time Redistribution Functionality will create 'PAY' analysis type rows for actual time paid, as well as "FRG" rows for employee fringe benefits.
 - General Ledger will be used for any adjustments and will create either 'GLR' or 'GLE' analysis type rows based on whether the transaction is revenue or expense related.



Running the Project to General Ledger Integration

Project > Collect Costs > GL Journal Adjustments

- Retrieve posted journals to PeopleSoft Projects with the PC_GL_TO_PC process.
- Enter your unique Run Control.



- If you do not have a Run Control established, please set one up using the 'Add a New Value' tab.

GL Journal Adjustments - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_GL_TO_PC.GBL

PeopleSoft®

Home World of Add to Favorites Sign out

General Ledger

Find an Existing Value Add a New Value

Run Control ID: nkgf


Program Name: PC_GL_TO_PC

Add

Find an Existing Value Add a New Value

Done

Start GL Journal Adjustmen... Projects Integration Projects Training Manual ... 10:57 AM

- Enter your Run Control ID.
- Click .

GL Journal Adjustments - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/EMP/q/INTEGRATE_RESOURCES.PC_GL_TO_PC.GBL

PeopleSoft

Home World Add to Favorites Sign out

New Window Help

General Ledger

User ID: nkhamneipur Run Control ID: nkgf [Process Monitor](#) [Run](#)

Program Name: PC_GL_TO_PC Process Frequency: Always

Find (View All) First 1 of 1 Last

*Business Unit Option: All Request Number: 1 [Proj Resources](#)





Application Options


Business Unit Option: All

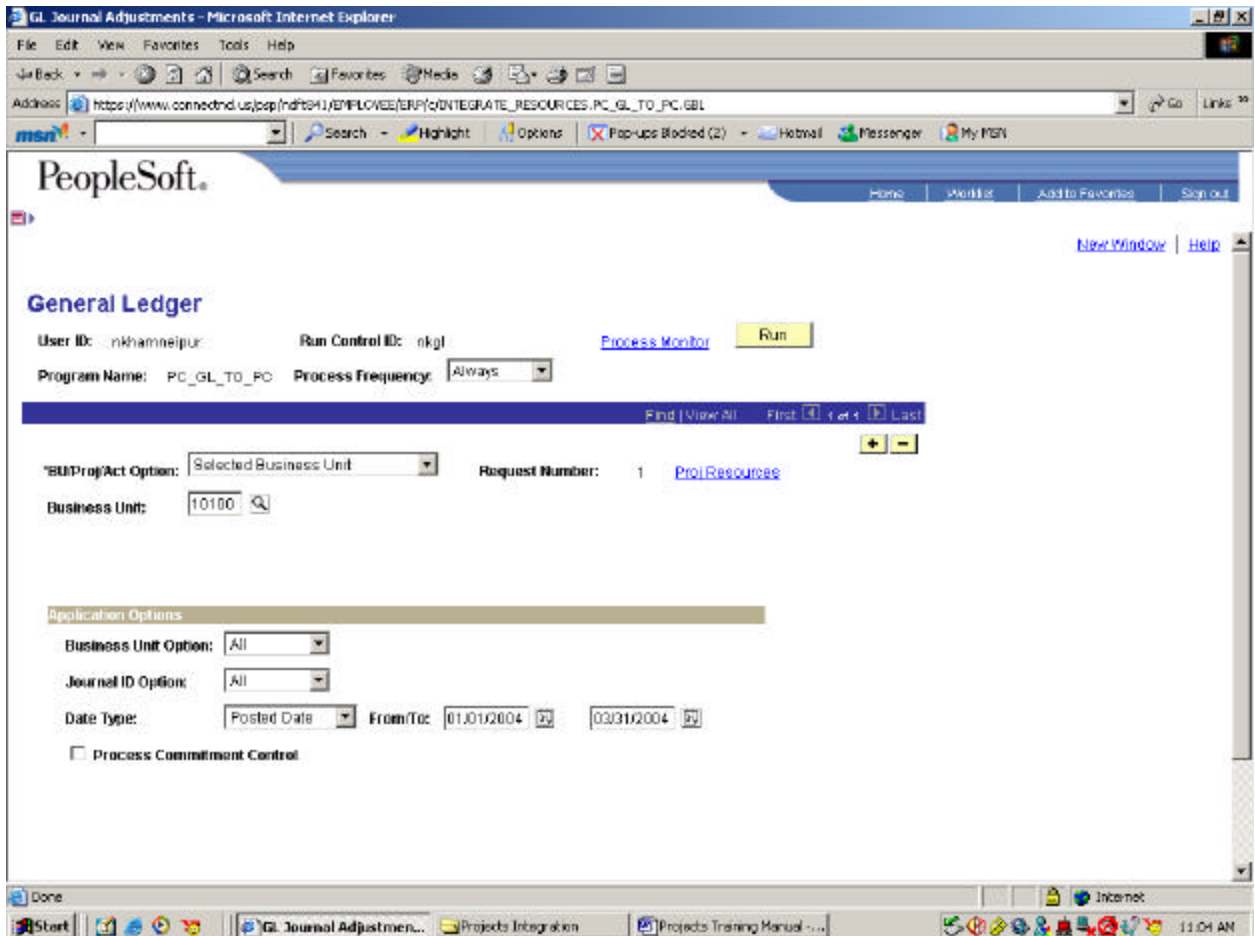
Journal ID Option: All

Date Type: Posted Date From/To: 03/31/2004 To: 03/31/2004

☐ Process Commitment Control

- Business Unit / Project Activity Option:
 - All
 - Selected Business Unit: Enter the appropriate Business Unit. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project: Enter the appropriate Business Unit and Project. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project / Activity: Enter the appropriate Business Unit, Project and Activity. Click the magnifying glass icon  to search for valid values.
- Business Unit Option: Signifies GL Business Unit
 - All
 - Value: Select the appropriate GL Business Unit. Click the magnifying glass icon  to search for valid values.
- Journal ID Option
 - All

- Some: Select the appropriate Journals. Click the magnifying glass icon  to search for valid values.
- Date Type: Enter the appropriate Date Range.
 - Journal Date
 - Posted Date



- Click 

GL Journal Adjustments - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/fndf041/EMPLOYEE/EMP/q/INTEGRATE_RESOURCES.PC_GL_TO_PC.GBL

PeopleSoft

Home World Add to Favorites Sign out

[New Window](#) [Saved](#)

Process Scheduler Request

User ID: nkhamtejour Run Control ID: nkg

Server Name: PSNT Run Date: 03/17/2004

Recurrence: Run Time: 11:04:45AM [Reset to Current Date/Time](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	GL to PC Interface	PC_GL_TO_PC	Application Engine	Web	TXT

[OK](#) [Cancel](#)

Done

Start [GL Journal Adjustmen...](#) [Projects Integration](#) [Projects Training Manual ...](#) 11:05 AM

- Select the appropriate **Server Name:**
- Select the GL to PC Interface checkbox.
- Click [OK](#) to run the process.

GL Journal Adjustments - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_GL_TO_PC.GBL

PeopleSoft®

Home World of Add to Favorites Sign out

New Window Help

General Ledger

User ID: nkhameipuri Run Control ID: nkgf [Process Monitor](#) [Run](#)

Program Name: PC_GL_TO_PC Process Frequency: Always Process Instance: 47093

Find (View All) First 1 of 1 Last

Business Unit Option: Selected Business Unit Request Number: 1 [ProcResource](#)

Business Unit: 10100

Application Options

Business Unit Option: All

Journal ID Option: All

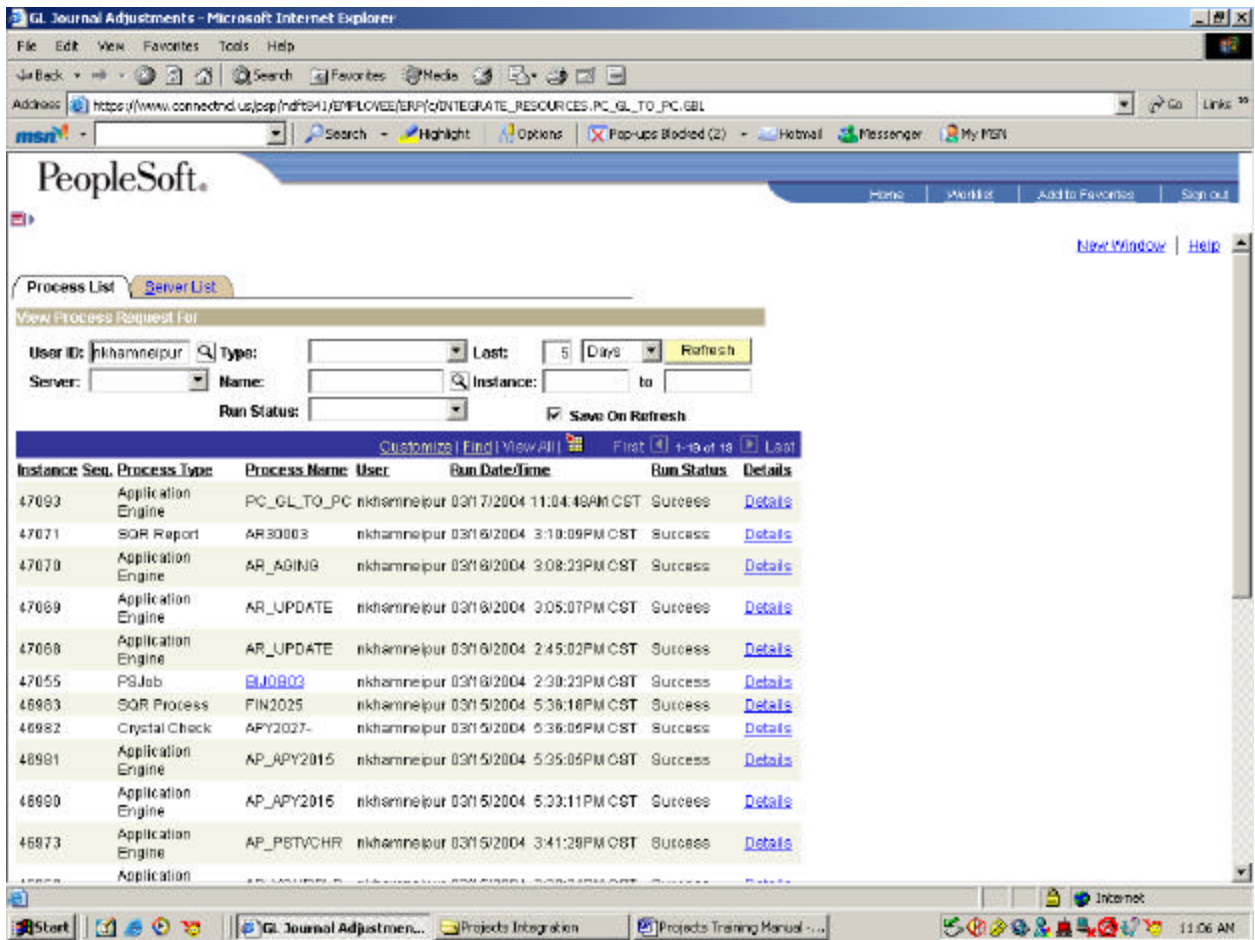
Date Type: Posted Date From/To: 01/01/2004 to 03/31/2004

☐ Process Commitment Control

Done

Start GL Journal Adjustmen... Projects Integration Projects Training Manual ... 11:05 AM

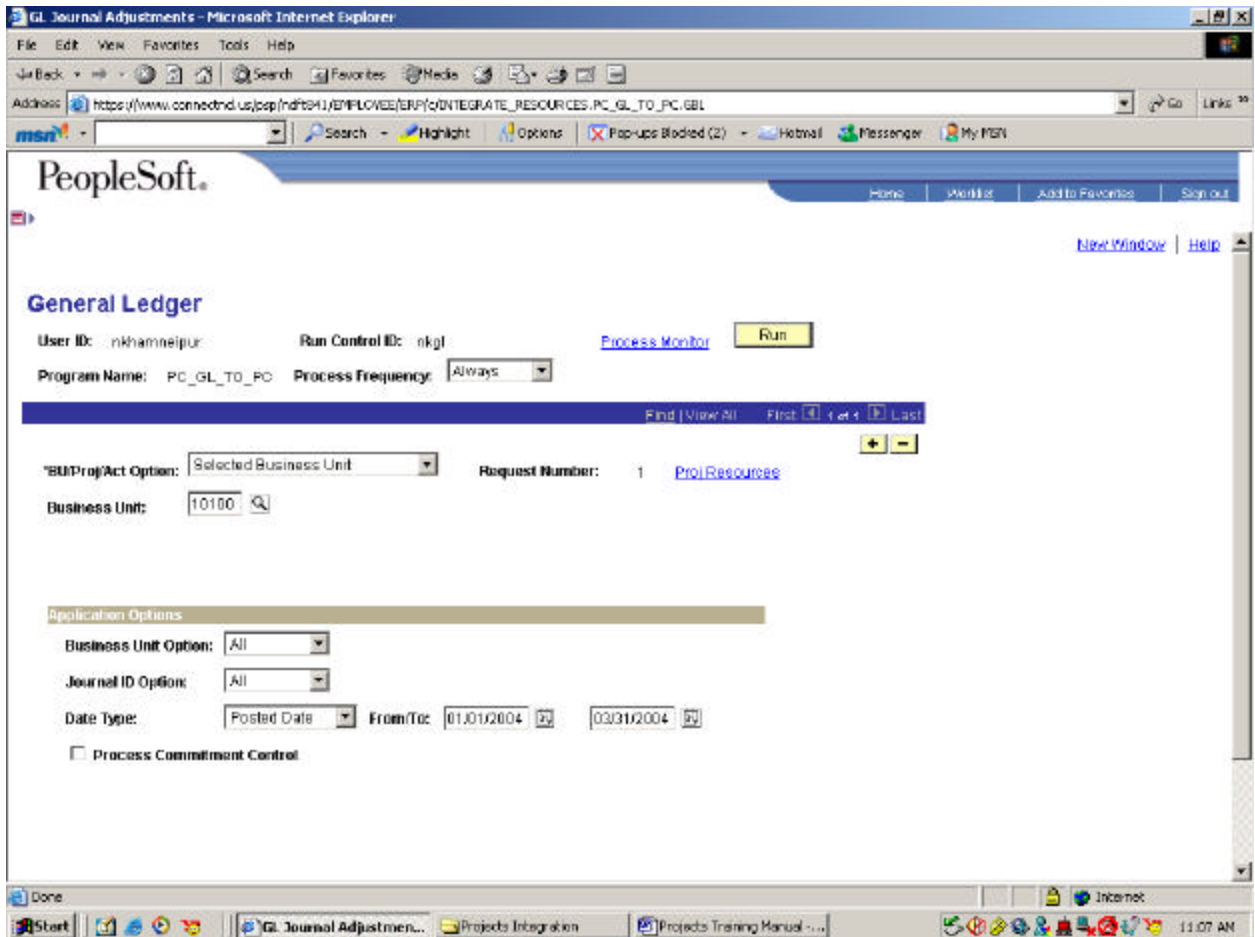
- Click the [Process Monitor](#) hyperlink to view the status of the process.



The screenshot shows the PeopleSoft 'GL Journal Adjustments' page in Microsoft Internet Explorer. The browser address bar displays the URL: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/EMP/c/DNTEGRATE_RESOURCES/PC_GL_TO_PC.GBL. The page features a 'Process List' tab and a 'View Process Request For' section with search filters for User ID (nkharnelpur), Type, Last (5 Days), and a Refresh button. Below the filters is a table of process instances.

Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
47093	Application Engine	PC_GL_TO_PC	nkharnelpur	03/17/2004 11:04:49AM CST	Success	Details
47071	SQR Report	AR30003	nkharnelpur	03/16/2004 3:10:09PM CST	Success	Details
47070	Application Engine	AR_AGING	nkharnelpur	03/16/2004 3:08:23PM CST	Success	Details
47069	Application Engine	AR_UPDATE	nkharnelpur	03/16/2004 3:05:07PM CST	Success	Details
47068	Application Engine	AR_UPDATE	nkharnelpur	03/16/2004 2:45:02PM CST	Success	Details
47055	PS Job	BJ0802	nkharnelpur	03/16/2004 2:39:23PM CST	Success	Details
46983	SQR Process	FIN2025	nkharnelpur	03/15/2004 5:36:16PM CST	Success	Details
46982	Crystal Check	APY2027-	nkharnelpur	03/15/2004 5:36:09PM CST	Success	Details
46981	Application Engine	AP_APY2015	nkharnelpur	03/15/2004 5:25:05PM CST	Success	Details
46980	Application Engine	AP_APY2016	nkharnelpur	03/15/2004 5:23:11PM CST	Success	Details
46973	Application Engine	AP_PSTVCHR	nkharnelpur	03/15/2004 3:41:28PM CST	Success	Details

- Click on [Go Back to General Ledger](#) hyperlink to return to the process page.



Note: This process will create 'GLR' and 'GLE' analysis types.

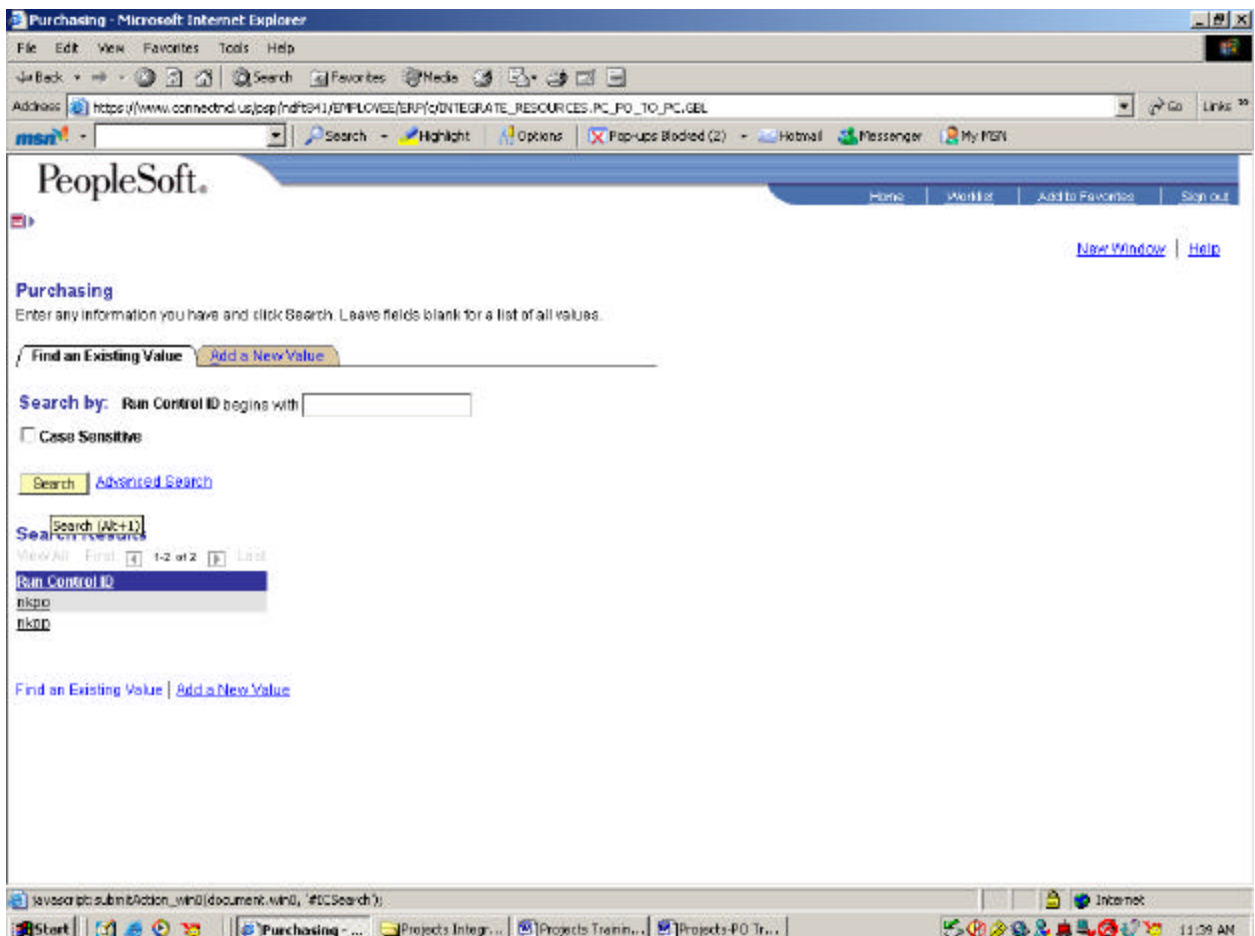
Running The Purchasing to Projects Integration

- With PeopleSoft Projects you can track procurement costs as they move through your system from requisitions to purchase orders to vouchers. The following steps illustrate this movement:
- Once a requisition has been created, PeopleSoft Purchasing can check to see whether the requested item exists in PeopleSoft Inventory. If the item is an inventory item, a demand can be created, posted, and picked up by Inventory for fulfillment. If the requested item is not an inventory item, a purchase order can be created.

- Once the purchase order has been approved and dispatched, it can be brought into PeopleSoft Projects as a committed cost (Analysis Type 'COM'). The purchase order can also be sent to the appropriate vendor.
- When a voucher is received from the vendor, it can be matched, approved, and posted in PeopleSoft Payables. The voucher information can then be brought into PeopleSoft Projects as an actual cost (Analysis Type 'ACT')

Projects > Collect Costs > Purchasing

- Enter your unique Run Control.



- If you do not have a Run Control established, please set one up using the 'Add a New Value' tab.

Purchasing - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print Mail Messenger My PCN

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_PO_TO_PC.GBL

msn Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My PCN

PeopleSoft®

Home World of Add to Favorites Sign out

New Window Help

Purchasing

Find an Existing Value Add a New Value

Run Control ID: nkpo

Program Name: PC_PO_TO_PC


Add

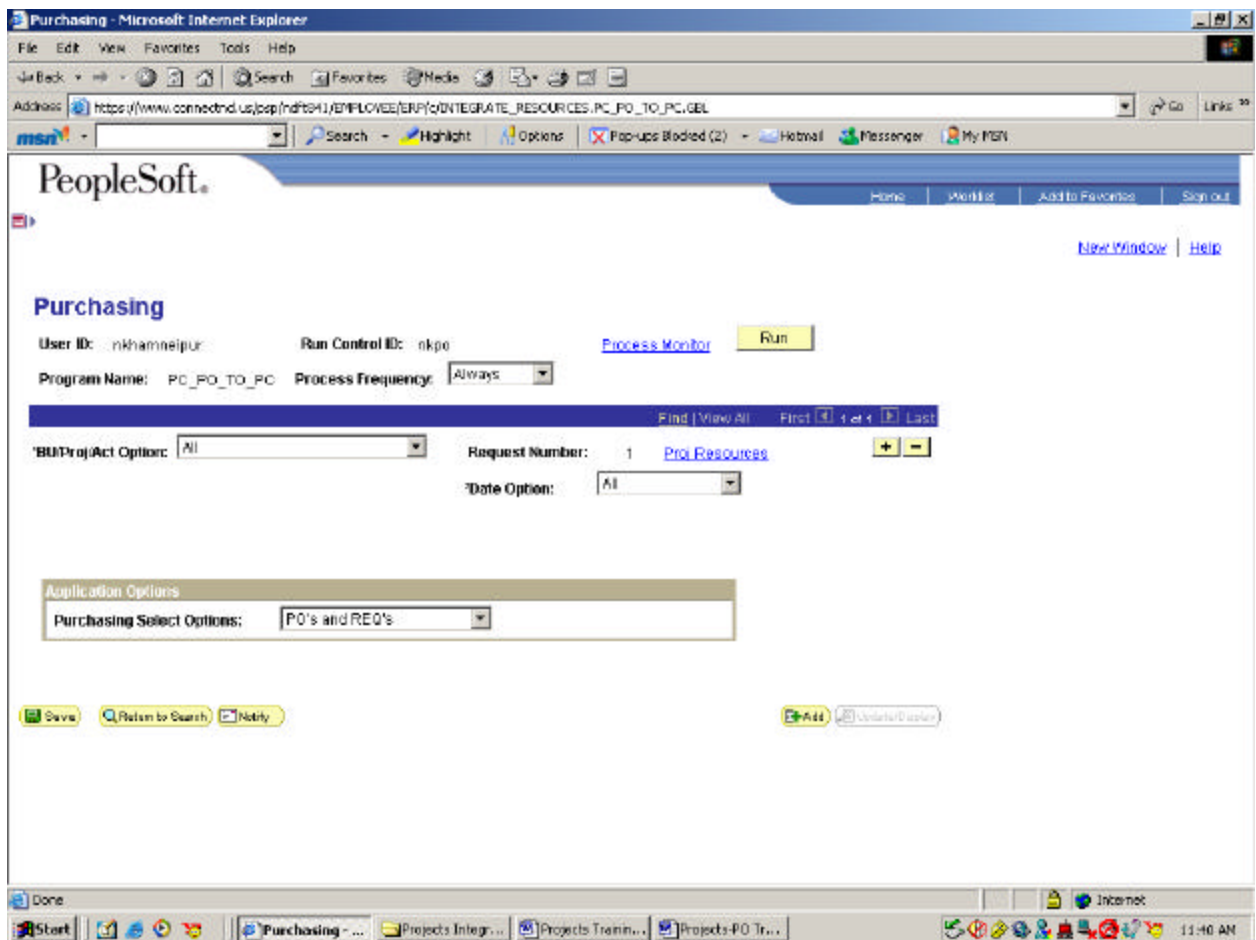
Find an Existing Value Add a New Value




Done

Start Purchasing - ... Projects Integr... Projects Train... Projects PO Tr...

Internet 11:40 AM

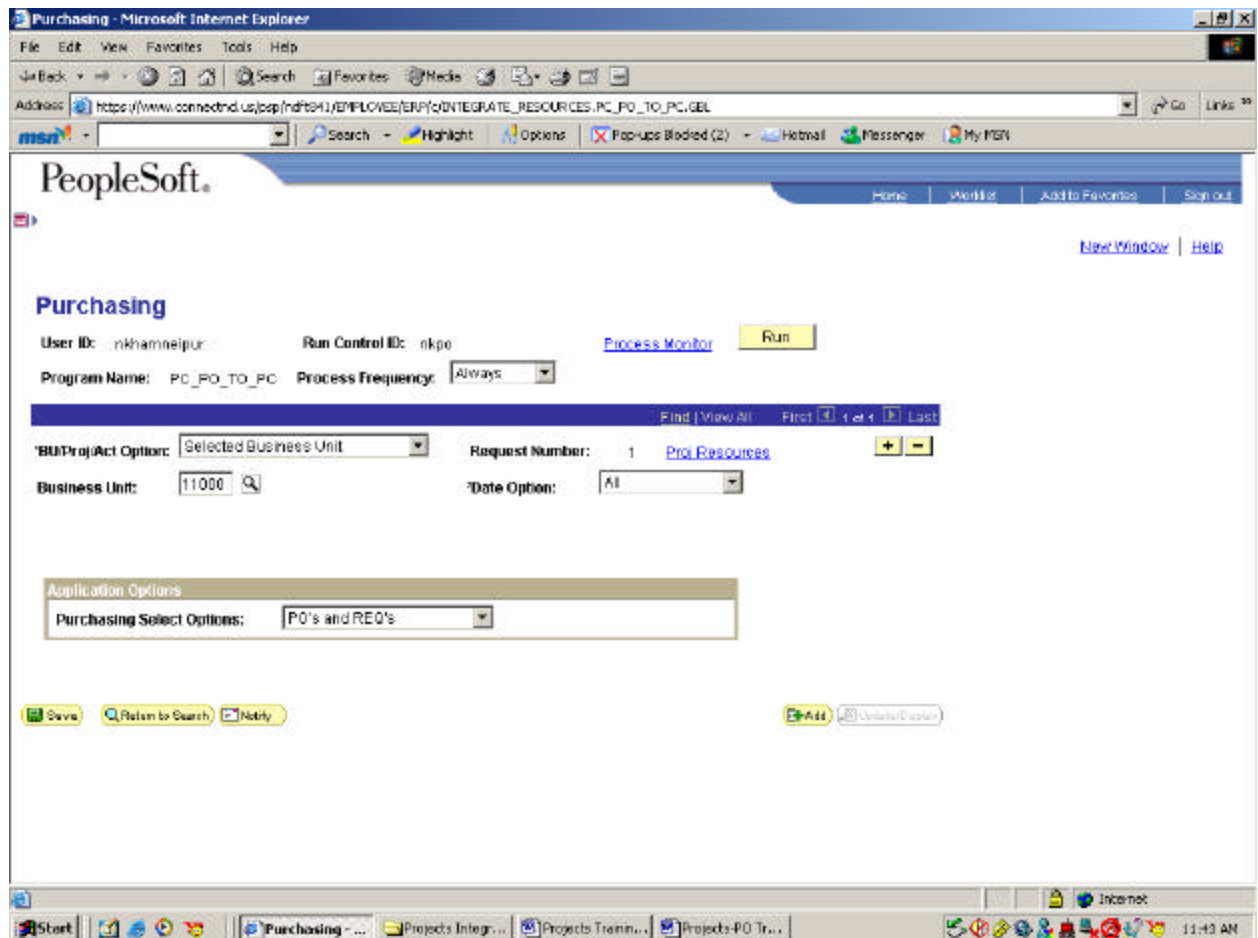
- Enter your Run Control ID.
- Click .



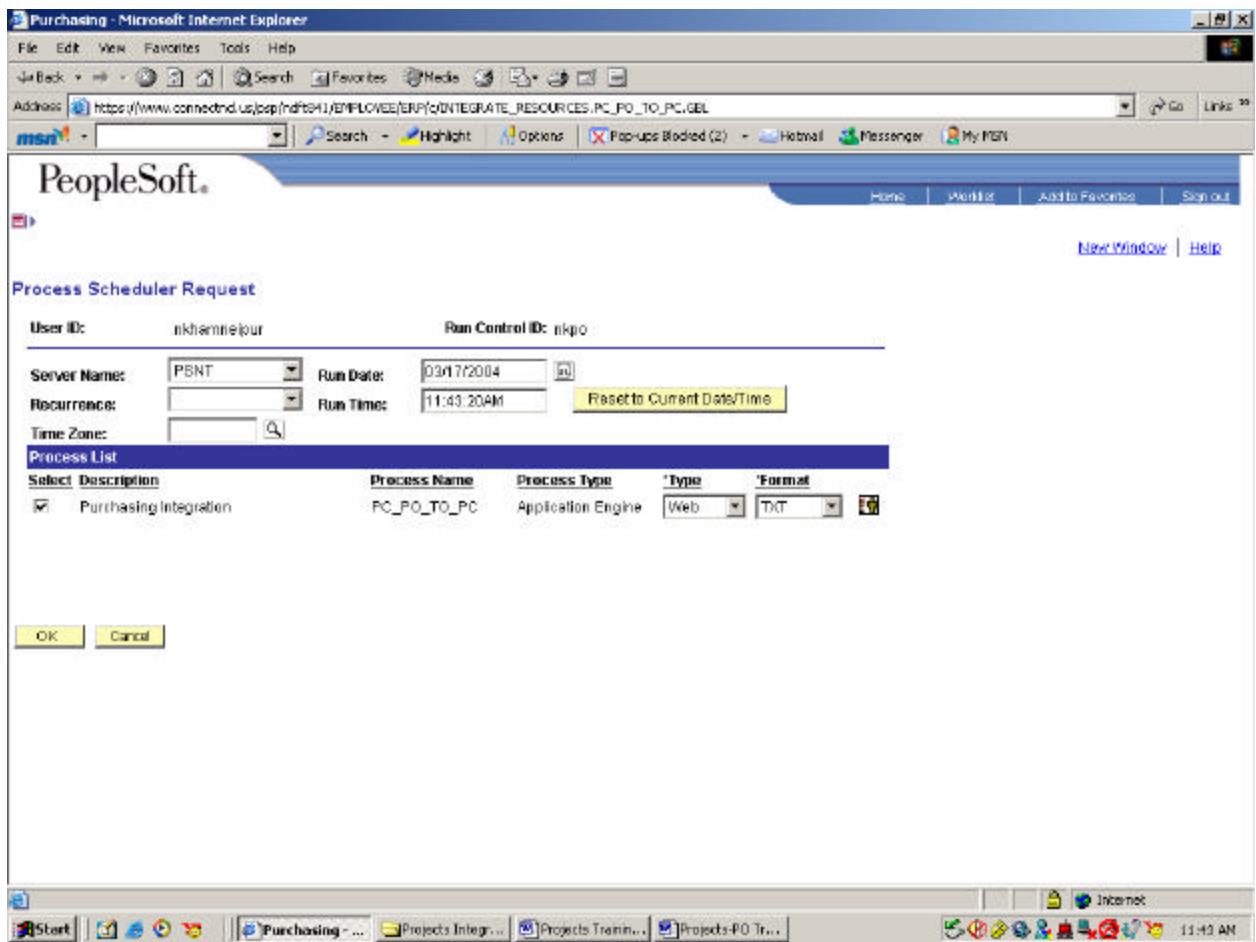
- Business Unit / Project Activity Option:
 - All
 - Selected Business Unit: Enter the appropriate Business Unit. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project: Enter the appropriate Business Unit and Project. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project / Activity: Enter the appropriate Business Unit, Project and Activity. Click the magnifying glass icon  to search for valid values.
- Date Type:
 - All
 - Accounting Date: Enter the appropriate Date Range.
 - Transaction Date: Enter the appropriate Date Range.
- Application Options: Purchasing Select Options
 - PO's and REQ's

- Purchase Orders only
- Purchase Requisitions only

Note: Process will bring requisitions and / or commitments (purchase orders) from PeopleSoft Purchasing into the PROJ_RESOURCE table with an analysis type of 'REQ' or 'COM'.



- Click 



Process Scheduler Request

User ID: nkhamtejour Run Control ID: nkpo

Server Name: PSNT Run Date: 03/17/2004

Recurrence: Run Time: 11:43:20AM [Reset to Current Date/Time](#)

Time Zone:

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	Purchasing Integration	PC_PO_TO_PC	Application Engine	Web	TXT

[OK](#) [Cancel](#)

- Select the appropriate **Server Name:**
- Select the Purchasing Integration checkbox.
- Click [OK](#) to run the process.

The screenshot shows a web browser window titled "Purchasing - Microsoft Internet Explorer". The address bar displays the URL: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_PO_TO_PC.GBL. The PeopleSoft logo is at the top left, and navigation links like "Home", "Worklist", "Add to Favorites", and "Sign out" are at the top right. The main heading is "Purchasing".

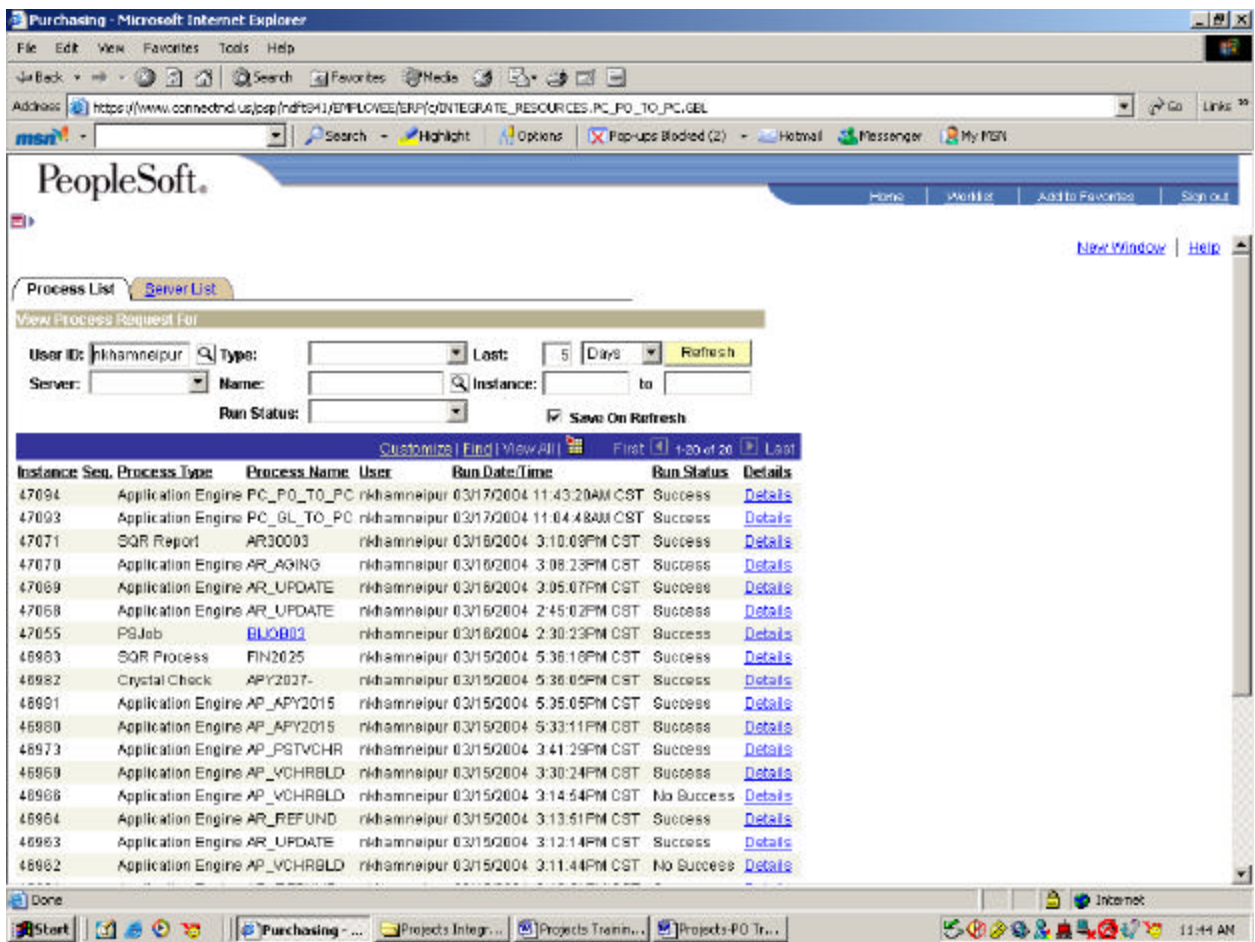
Below the heading, there are fields for "User ID: nkhameipuri", "Run Control ID: nkpo", and a "Process Monitor" link next to a "Run" button. The "Program Name" is "PC_PO_TO_PC" and the "Process Frequency" is set to "Always". The "Process Instance" is "47084".

There are search and filter options: "Find (View All)" and "First 1 of 1 Last". The "Business Unit" is set to "11000" and the "Date Option" is set to "All". The "Request Number" is "1".

Under "Application Options", the "Purchasing Select Options" is set to "PO's and REQ's".

At the bottom, there are buttons for "Save", "Return to Search", "Notify", "Add", and "Update/Refresh". The taskbar at the bottom shows several open applications, including "Purchasing", "Projects Integr...", "Projects Train...", and "Projects PO Tr...". The system clock shows "11:44 AM".

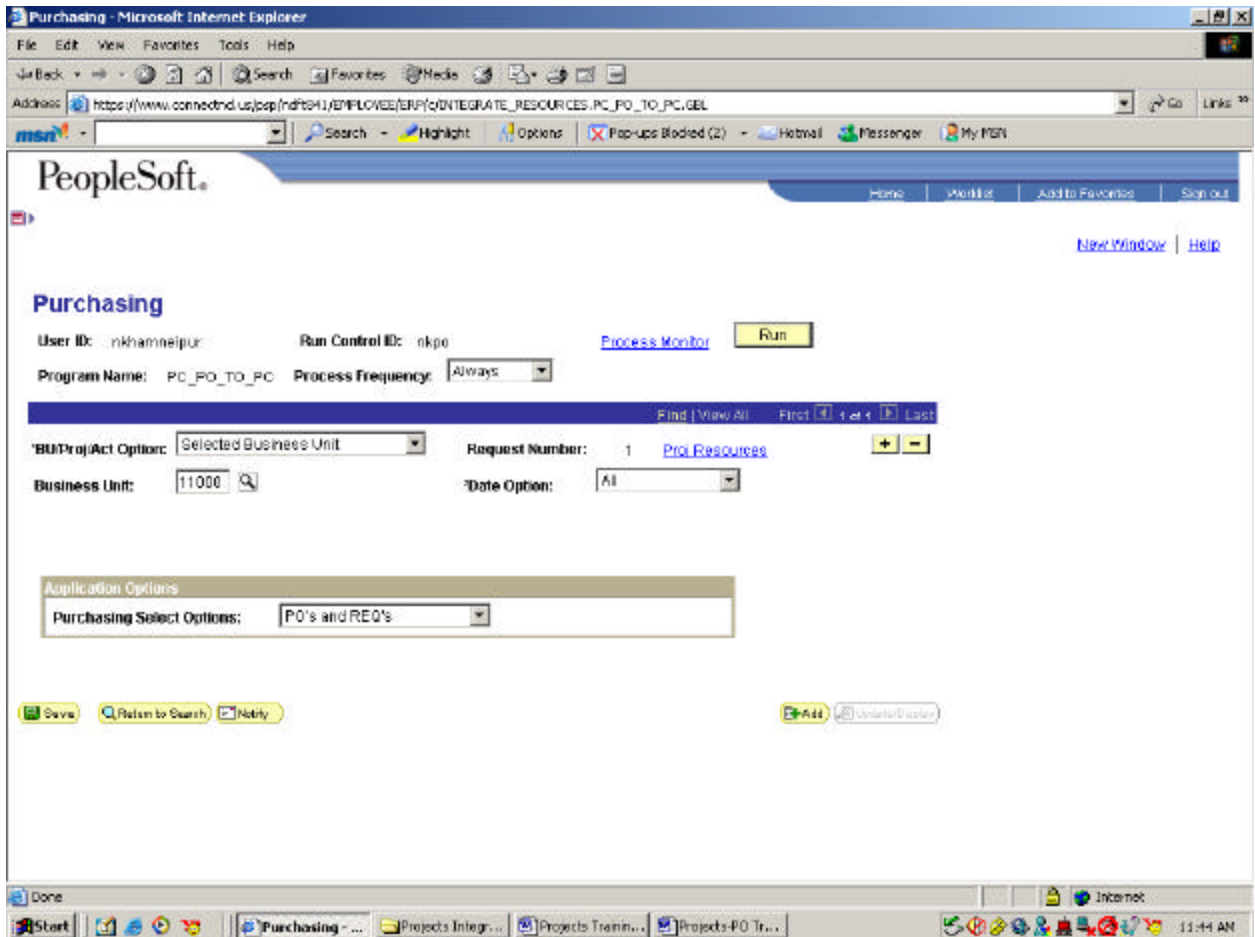
- Click the [Process Monitor](#) hyperlink to view the status of the process.



The screenshot shows the PeopleSoft Purchasing interface in a Microsoft Internet Explorer browser window. The address bar displays the URL: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/EMP/cd/INTEGRATE_RESOURCES/PC_PO_TO_PC.GBL. The interface includes a search bar, navigation links (Home, World of, Add to Favorites, Sign out), and a "New Window" button. The main content area is titled "Process List" and "Server List". It features a "View Process Request for" section with fields for User ID (nkhamneipur), Type, Last (5 Days), and a Refresh button. Below this is a table of processes with columns for Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, and Details. The table lists various processes, including Application Engine, SQR Report, and Crystal Check, with their respective run dates and times. The status of each process is indicated as Success or No Success. The bottom of the browser window shows the Windows taskbar with the Start button and several open applications.

Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Details
47094		Application Engine	PC_PO_TO_PC	nkhamneipur	03/17/2004 11:43:20AM CST	Success	Details
47093		Application Engine	PC_GL_TO_PC	nkhamneipur	03/17/2004 11:04:48AM CST	Success	Details
47071		SQR Report	AR30003	nkhamneipur	03/16/2004 3:10:09PM CST	Success	Details
47070		Application Engine	AR_AGING	nkhamneipur	03/16/2004 3:08:23PM CST	Success	Details
47069		Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 3:05:07PM CST	Success	Details
47068		Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 2:45:02PM CST	Success	Details
47055		PSJob	BL0903	nkhamneipur	03/16/2004 2:30:23PM CST	Success	Details
46983		SQR Process	FIN2025	nkhamneipur	03/15/2004 5:36:16PM CST	Success	Details
46982		Crystal Check	APY2027-	nkhamneipur	03/15/2004 5:36:05PM CST	Success	Details
46981		Application Engine	AP_APY2015	nkhamneipur	03/15/2004 5:35:05PM CST	Success	Details
46980		Application Engine	AP_APY2015	nkhamneipur	03/15/2004 5:33:11PM CST	Success	Details
46973		Application Engine	AP_PSTVCHR	nkhamneipur	03/15/2004 3:41:29PM CST	Success	Details
46969		Application Engine	AP_VCHRBLD	nkhamneipur	03/15/2004 3:30:24PM CST	Success	Details
46968		Application Engine	AP_VCHRBLD	nkhamneipur	03/15/2004 3:14:54PM CST	No Success	Details
46964		Application Engine	AR_REFUND	nkhamneipur	03/15/2004 3:13:51PM CST	Success	Details
46963		Application Engine	AR_UPDATE	nkhamneipur	03/15/2004 3:12:14PM CST	Success	Details
46962		Application Engine	AP_VCHRBLD	nkhamneipur	03/15/2004 3:11:44PM CST	No Success	Details

- Click on [Go Back to Purchasing](#) hyperlink to return to the process page.



Note: This process will create 'REQ' and 'COM' analysis types depending on the Application Options: Purchasing Select Options.

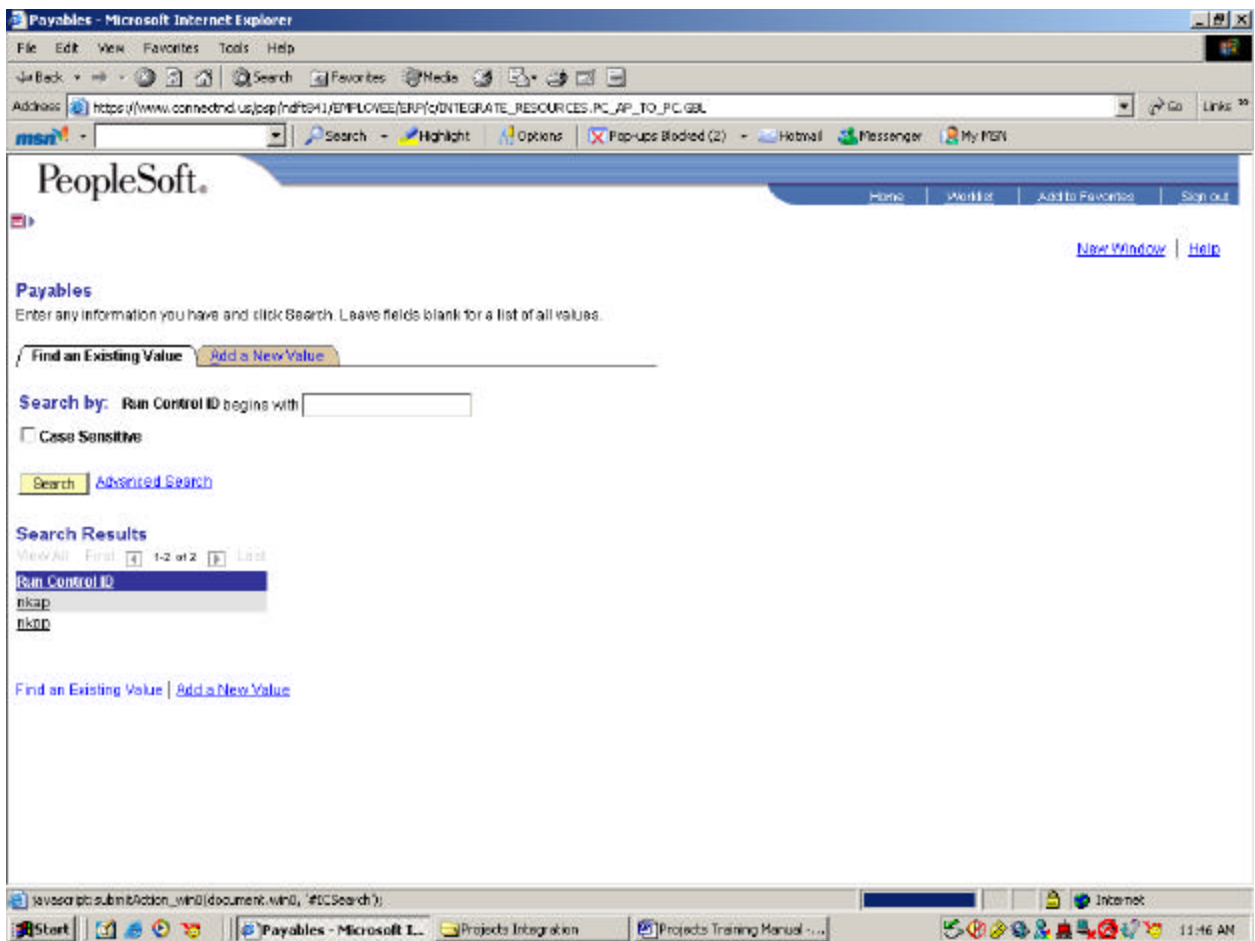
Running the Payables to Projects Integration

- Following are actions that occur to integrate demand between PeopleSoft Projects and PeopleSoft Payables:
- When a purchase order has been created in PeopleSoft Purchasing, it is sent to PeopleSoft Payables.
- Vouchers entered into PeopleSoft Payables for bills received go through a matching process.
- When a voucher has been matched, it is approved and posted to the VCHR_ACCTG_LINE table.

- Vouchers in the VCHR_ACCTG_LINE table that carry a PC Distribution status of *N* can be pulled into PeopleSoft Projects with an analysis type of *ACT*.

Projects > Collect Costs > Payables

- Enter your unique Run Control.



- If you do not have a Run Control established, please set one up using the 'Add a New Value' tab.

Payables - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_AP_TO_PC.GBL

PeopleSoft®

Home World of Add to Favorites Sign out

[New Window](#) [Help](#)

Payables

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

Program Name:

[Find an Existing Value](#) [Add a New Value](#)

Done

Start Payables - Microso... Projects Integration Projects Training Men... Steve Rupp (sprupp) ... 11:47 AM

- Enter your Run Control ID.
- Click .

Payables - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/ndf0341/EMPLOYEE/EMP/q/INTEGRATE_RESOURCES.PC_AP_TO_PC.GBL

PeopleSoft

Home World Add to Favorites Sign out

New Window Help

Payables

User ID: nkhameipur Run Control ID: nkap Process Monitor Run

Program Name: PC_AP_TO_PC Process Frequency: Always

Find View All First Previous Next Last

BU/Proj/Act Option: All Request Number: 1 Proc Resources

Date Option: All




Application Options

Detail or Summary: Summary

Save Return to Search Notify Add Update/Cancel

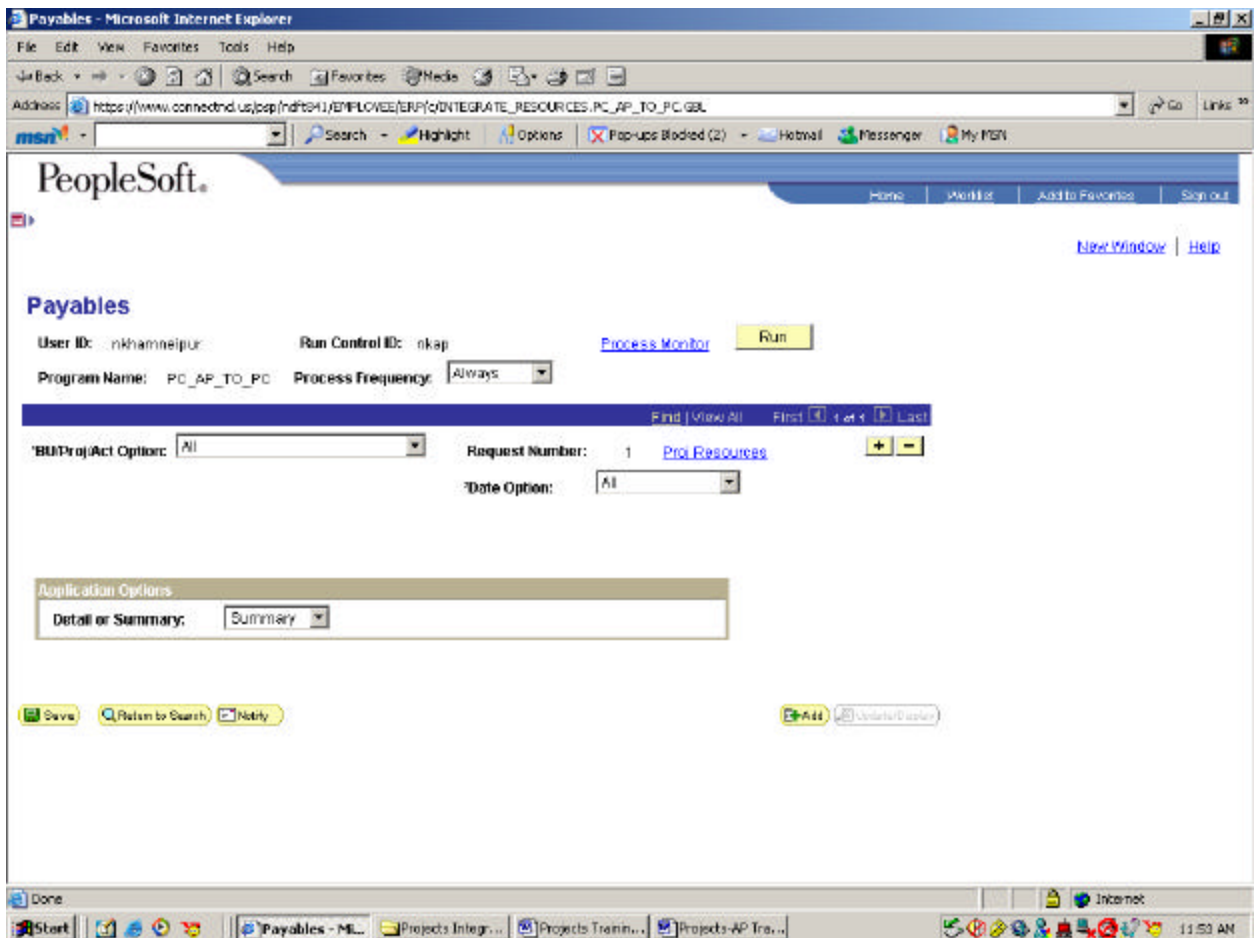
Done

Start Payables - Microso... Projects Integration Projects Training Man... 11:48 AM

- Business Unit / Project Activity Option:
 - All
 - Selected Business Unit: Enter the appropriate Business Unit. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project: Enter the appropriate Business Unit and Project. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project / Activity: Enter the appropriate Business Unit, Project and Activity. Click the magnifying glass icon  to search for valid values.
- Date Type:
 - All
 - Accounting Date: Enter the appropriate Date Range.
 - Transaction Date: Enter the appropriate Date Range.
- Application Options: Summary or Detail
 - Summary

- Detail

Note: Process takes voucher information and creates Project Resource rows. Selecting 'Summary' will create one row with an Analysis Type of 'ACT'. However, selecting 'Detail' will generate separate Resource rows for each type of cost on the voucher.



- Click 

PeopleSoft®

Process Scheduler Request

User ID: nkhamtejour Run Control ID: nkap

Server Name: PSNT Run Date: 03/17/2004

Recurrence: Run Time: 11:54:01AM

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	AP to PC Interface	PC_AP_TO_PC	Application Engine	Web	TXT

OK Cancel

- Select the appropriate **Server Name:** PSNT
- Select the AP to PC Interface checkbox.
- Click **OK** to run the process.

Payables - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Go Back Forward Stop Reload Home Search Favorites Media Print Mail

Address: https://www.connectind.us/psp/ndf541/EMPLOYEE/EMP/c/INTEGRATE_RESOURCES.PC_AP_TO_PC.GBL Go Links

msn Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My MSN

PeopleSoft

Home My Worklist Add to Favorites Sign out

New Window Saved

Payables

User ID: nKhamneipur Run Control ID: nkap Process Monitor Run

Program Name: PC_AP_TO_PC Process Frequency: Always Process Instance: 47065

First View All First 1 of 1 Last

*BUProj(Act Option: All Request Number: 1 Proj Resources + -

*Date Option: All

Application Options

Detail or Summary: Summary

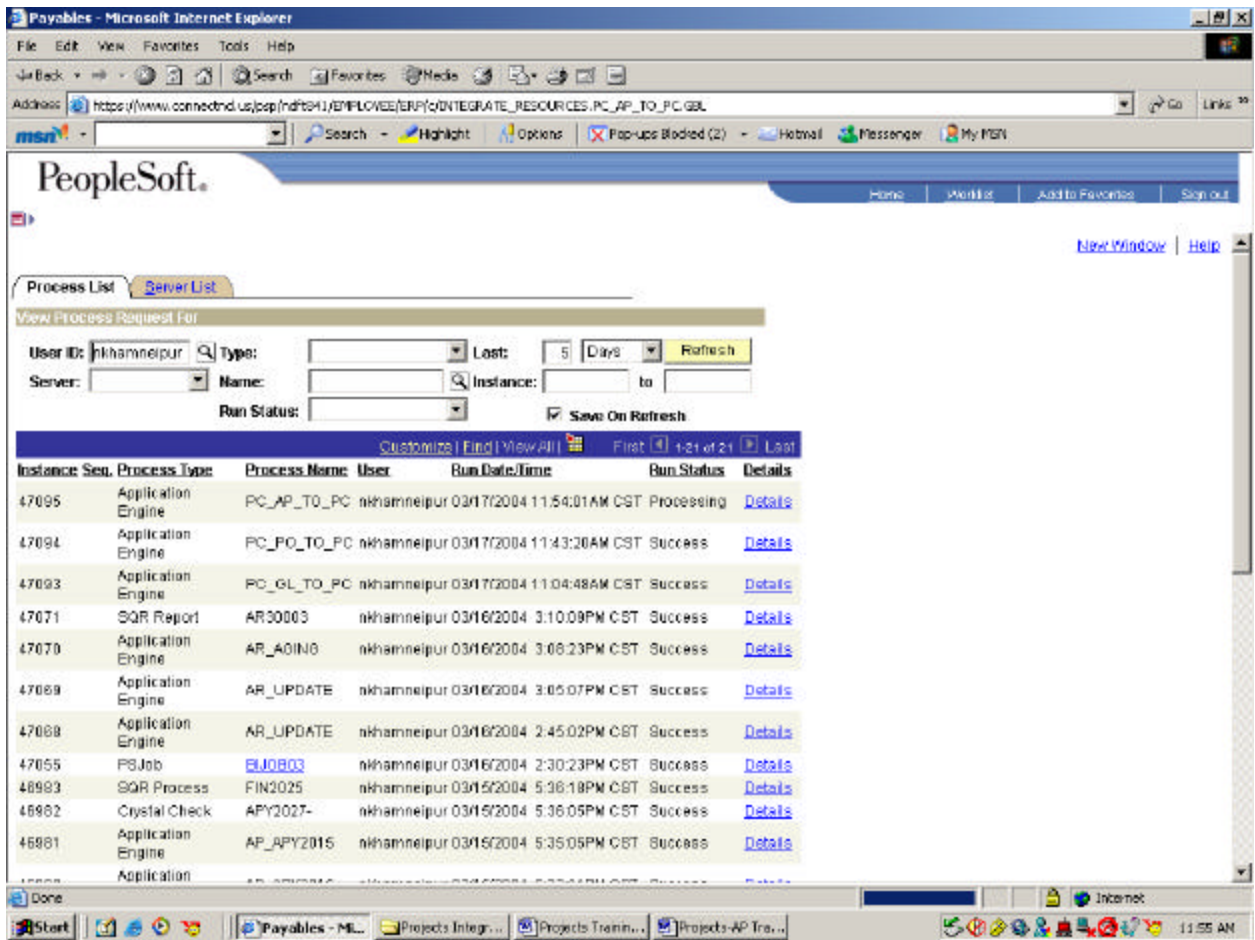
Save Return to Search Notify Add Validate/Cancel

Done

Start Payables - ML Projects Integr... Projects Train... Projects-AP Tra... Internet

11:55 AM

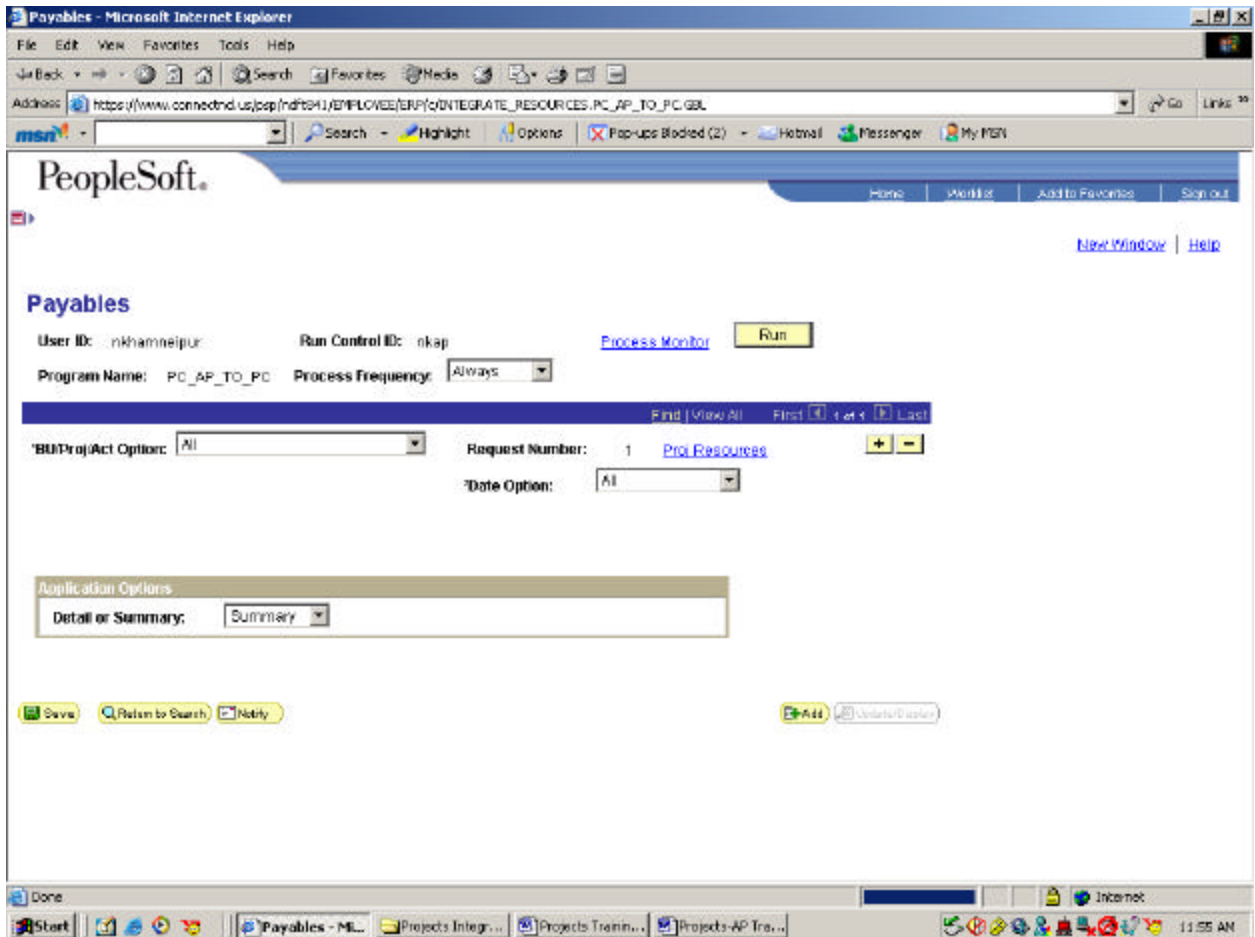
- Click the [Process Monitor](#) hyperlink to view the status of the process.



The screenshot shows the PeopleSoft Payables interface in a Microsoft Internet Explorer browser. The address bar displays the URL: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/EMP/c/DNTEGRATE_RESOURCES/PC_AP_TO_PC.GBL. The interface includes a search bar, a "Process List" tab, and a "View Process Request For" section with filters for User ID, Type, Last, Days, and Refresh. Below this is a table of processes with columns for Instance Seq, Process Type, Process Name, User, Run Date/Time, Run Status, and Details.

Instance Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Details
47095	Application Engine	PC_AP_TO_PC	nkhamneipur	03/17/2004 11:54:01AM CST	Processing	Details
47094	Application Engine	PC_PO_TO_PC	nkhamneipur	03/17/2004 11:43:20AM CST	Success	Details
47093	Application Engine	PC_GL_TO_PC	nkhamneipur	03/17/2004 11:04:48AM CST	Success	Details
47071	SQR Report	AR30003	nkhamneipur	03/16/2004 3:10:09PM CST	Success	Details
47070	Application Engine	AR_A0IN0	nkhamneipur	03/16/2004 3:08:23PM CST	Success	Details
47069	Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 3:05:07PM CST	Success	Details
47068	Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 2:45:02PM CST	Success	Details
47055	PSJob	BJ0803	nkhamneipur	03/16/2004 2:30:23PM CST	Success	Details
46993	SQR Process	FIN2025	nkhamneipur	03/15/2004 5:36:18PM CST	Success	Details
46982	Crystal Check	APY2027-	nkhamneipur	03/15/2004 5:36:05PM CST	Success	Details
46981	Application Engine	AP_APY2015	nkhamneipur	03/15/2004 5:35:05PM CST	Success	Details

- Click on [Go Back to Payables](#) hyperlink to return to the process page.



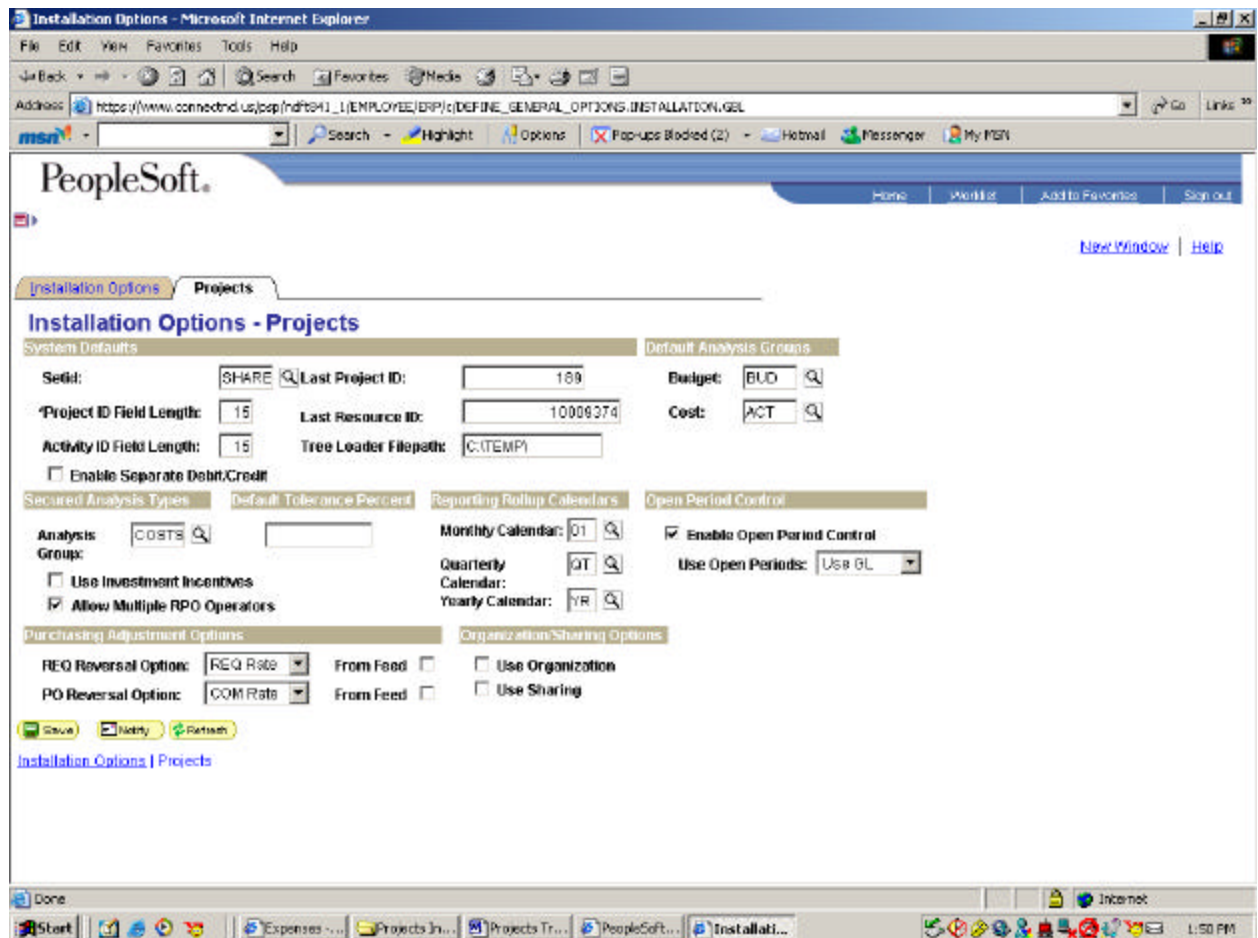
Note: This process will create 'ACT' analysis types.

Running the Purchasing Adjustment Process

- The purchasing adjustment process in PeopleSoft Projects can perform three types of actions:
 - Reverse requisitions.
 - Reverse purchase orders (commitments).
 - Adjust closed purchase orders.
- There are two analysis groups used in the Purchasing Adjustment process:
 - *POADJ* identifies the mapping used by the Application Engine process for requisition and purchase order reversals.
 - *OPENC* determines open commitment balances for the closed purchase order adjustments.

Installation Options – Projects Purchasing Adjustment

Setup Financials / Supply Chain > Install > Installation Options > Projects



Installation Options - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndfsm1_1/EMPLOYEE/ERP/c/DEFINE_GENERAL_OPTIONS_INSTALLATION.GEL

PeopleSoft.

Home | World | Add to Favorites | Sign out

[New Window](#) | [Help](#)

Installation Options - Projects

System Defaults

Setid: Last Project ID: Budget:
 Project ID Field Length: Last Resource ID: Cost:
 Activity ID Field Length: Tree Leader Filepath:
☐ Enable Separate Debit/Credit

Default Analysis Groups

Secured Analysis Types: Default Tolerance Percent:
☐ Use Investment Incentives
☒ Allow Multiple RPO Operators

Reporting Rollup Calendars

Monthly Calendar:
 Quarterly Calendar:
 Yearly Calendar:

Open Period Control

☒ Enable Open Period Control
 Use Open Periods:

Purchasing Adjustment Options

REQ Reversal Option: From Feed ☐
 PO Reversal Option: From Feed ☐

Organization/Sharing Options

☐ Use Organization
☐ Use Sharing

[Save](#) [Apply](#) [Refresh](#)

[Installation Options | Projects](#)

Purchasing Adjustment Options:

REQ Reversal Option Determines the calculation method used to reduce the balance of purchase requisitions as corresponding purchase orders are dispatched.

COM Amount: Reduces purchase requisitions by the quantity and amount of corresponding purchase orders when they have been dispatched.

REQ Rate: Reduces requisitions using the committed quantity multiplied by the cost per unit on the purchase requisition. This is the default option.

- PO Reversal Option**
- REQ Total:* Reverses the purchase requisition entirely when any corresponding purchase order is committed.
- Determines the calculation method that will be used to reduce the balance of Purchase Orders as corresponding Vouchers and Material Requests are processed.
- COM Rate:* Reduces the purchase order based on the actual quantity from PO Vouchers or Material Requests multiplied by the line cost per unit on the purchase order. This is the default option.
- ACT Rate:* Reduces the purchase order in the amount of the actual quantity and cost.

Requisition Reversals

- This table shows adjustment calculations produced by three different requisition reversal options. In each case, a summarized reversal row is created by grouping the requisition, item, and unit of measure.

Analysis Type	Quantity	Unit of Measure	Total Amount	Unit Price
REQ (Requisition)	10	EA	100	10
COM (Purchase Order)	5	EA	35	7

Adjustment produced using the REQ Rate option:

RRV	5	EA	50	10
-----	---	----	----	----

Adjustment produced using the COM Amount option:

(Note: If the COM amount exceeds the REQ amount, the total REQ amount will be used.)

RRV	5	EA	35	N/A
-----	---	----	----	-----

Adjustment produced using the REQ Total option:

RRV	10	EA	100	10
-----	----	----	-----	----

Note: The same options apply to requisitions that are reversed by inventory costs that fulfill the requisition.

Purchase Order (Commitment) Reversals

Requisition and Purchase Order details:

Analysis Type	Quantity	Unit of Measure	Total Amount	Unit Price
COM	10	EA	100	10
ACT	5	EA	35	7

Adjustment produced using the COM Rate option:

CRV	5	EA	50	10
-----	---	----	----	----

Adjustment produced using the ACT Amount option:

(Note: If the ACT amount exceeds the COM amount, the total COM amount will be used.)

CRV	5	EA	35	N/A
-----	---	----	----	-----

Closed Purchase Order Adjustments

- This table shows the reversal created when a purchase order is closed or cancelled. To create the reversal, select the *PO Close Adjustments* option when running the Purchasing Adjustment process. Once a purchase order has been manually cancelled or closed in PeopleSoft Purchasing, this process will create a reversal row with an analysis type of *CCA* so that the outstanding commitment can be reduced.

Requisition and Purchase Order details:

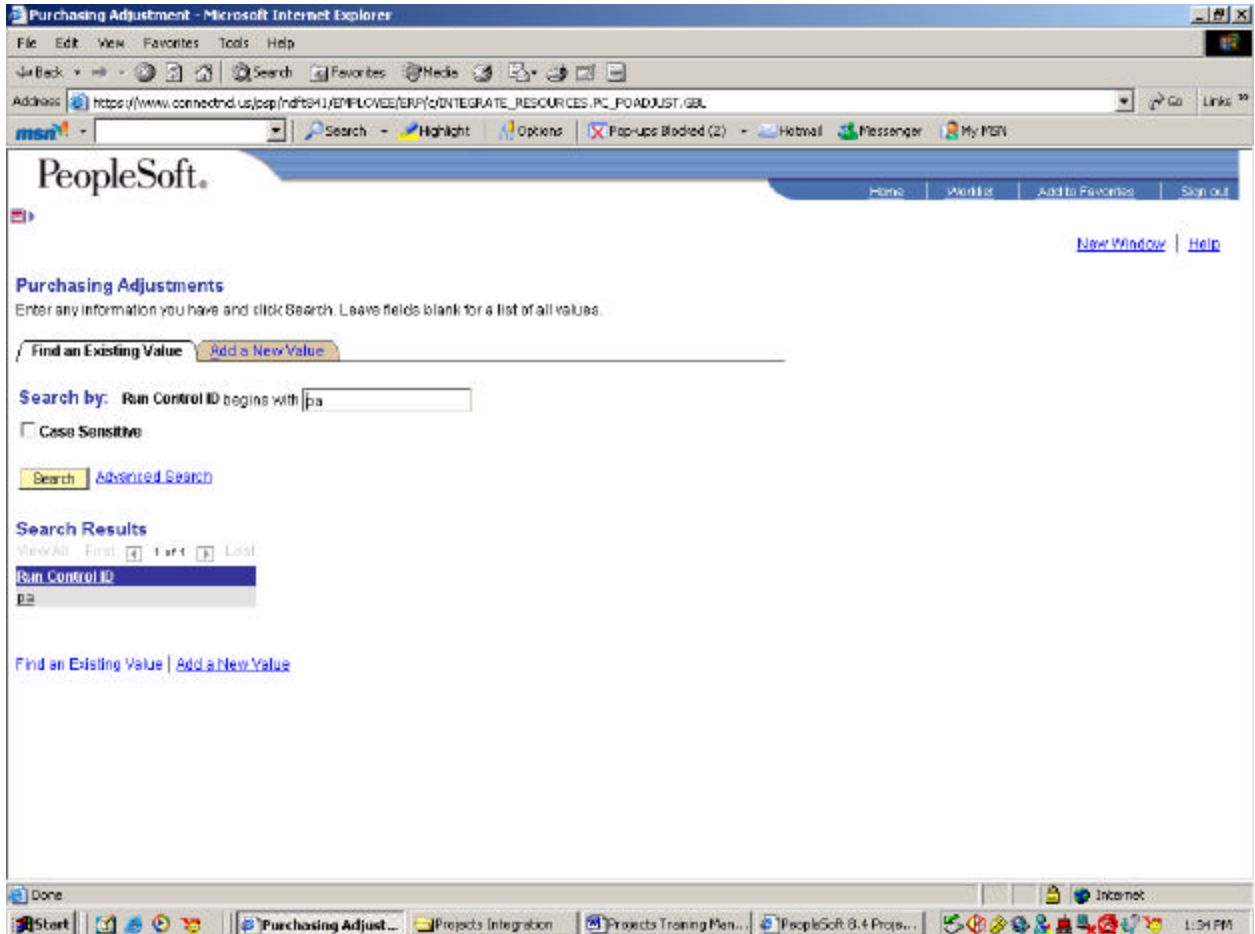
Analysis Type	Quantity	Unit of Measure	Total Amount
COM	5	EA	35

Adjustment produced by PO Close Adjustment option:

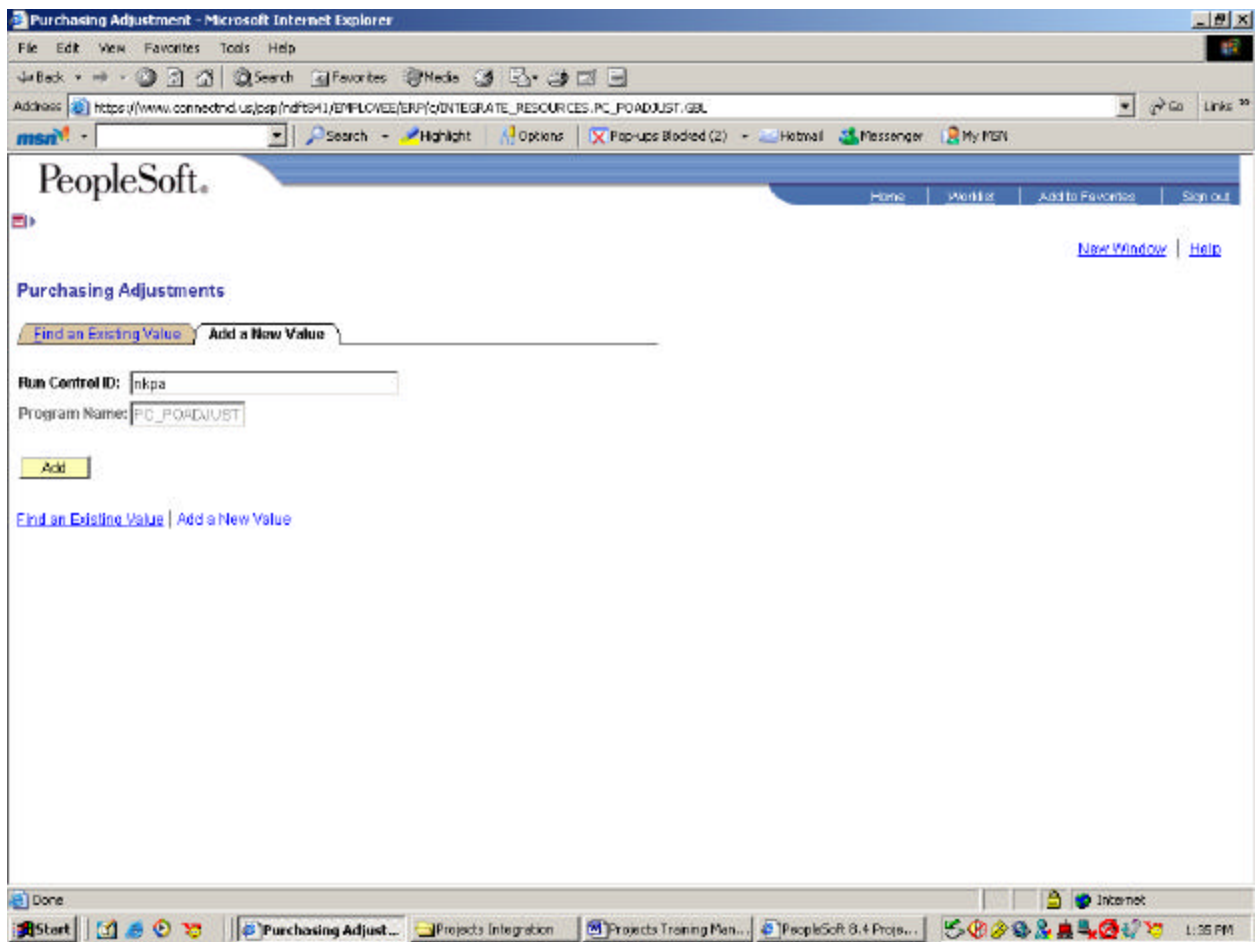
CCA	5	EA	35
-----	---	----	----

Projects > Collect Costs > Purchasing Adjustment

- Enter your unique Run Control.



- If you do not have a Run Control established, please set one up using the 'Add a New Value' tab.



Purchasing Adjustment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print

Address https://www.connectnd.us/bsp/ndf0341/EMPLOYEE/EMP/q/INTEGRATE_RESOURCES/PC_POADJUST.GBL Go Links

Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My PSN

PeopleSoft® Home Worklist Add to Favorites Sign out

New Window Help

Purchasing Adjustments

Find an Existing Value Add a New Value

Run Control ID: nkpa


Program Name: PC_POADJUST

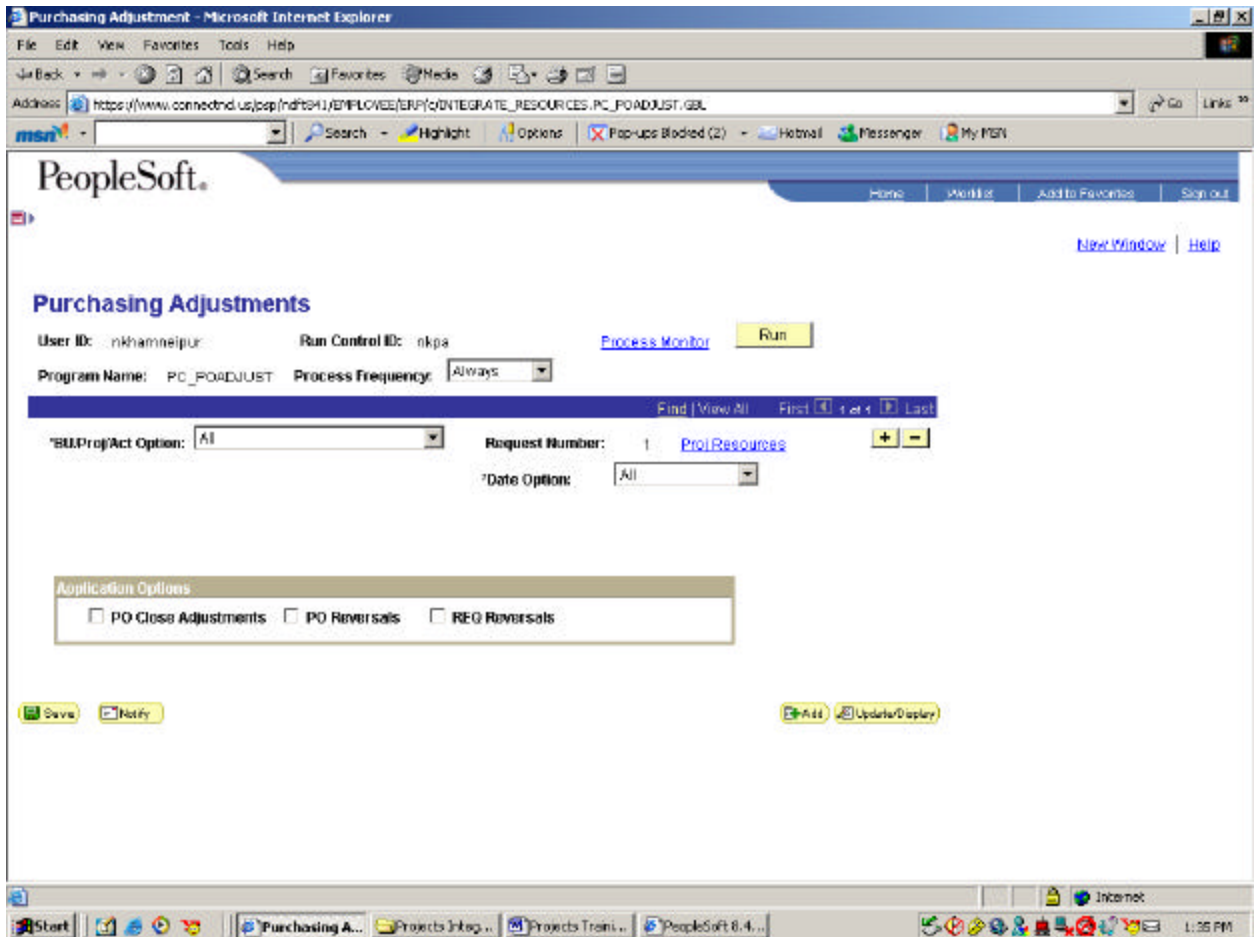
Add




Find an Existing Value Add a New Value

Done

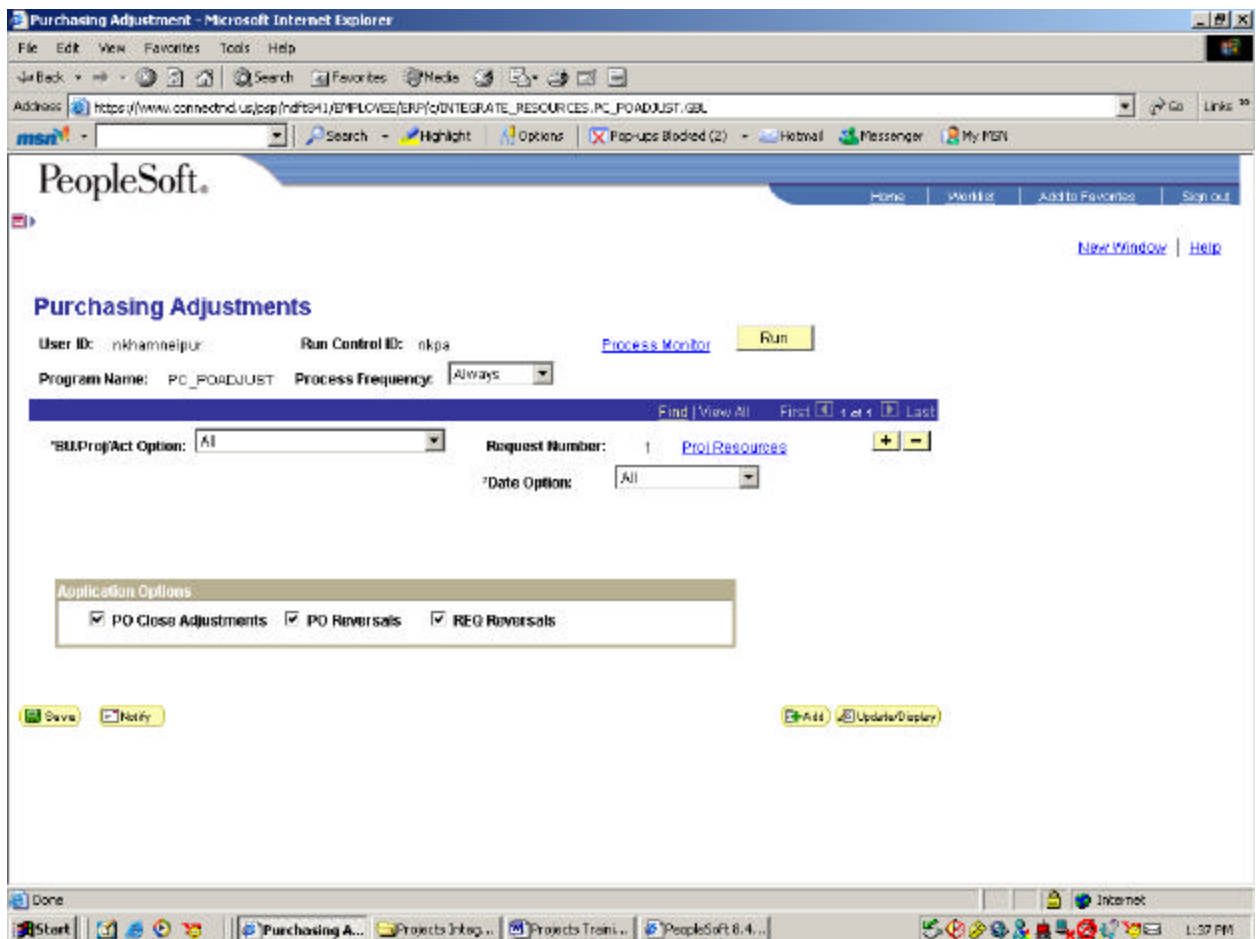
Start Purchasing Adjust... Projects Integration Projects Training Man... PeopleSoft 8.4 Proje... 1:35 PM

- Enter your Run Control ID.
- Click .



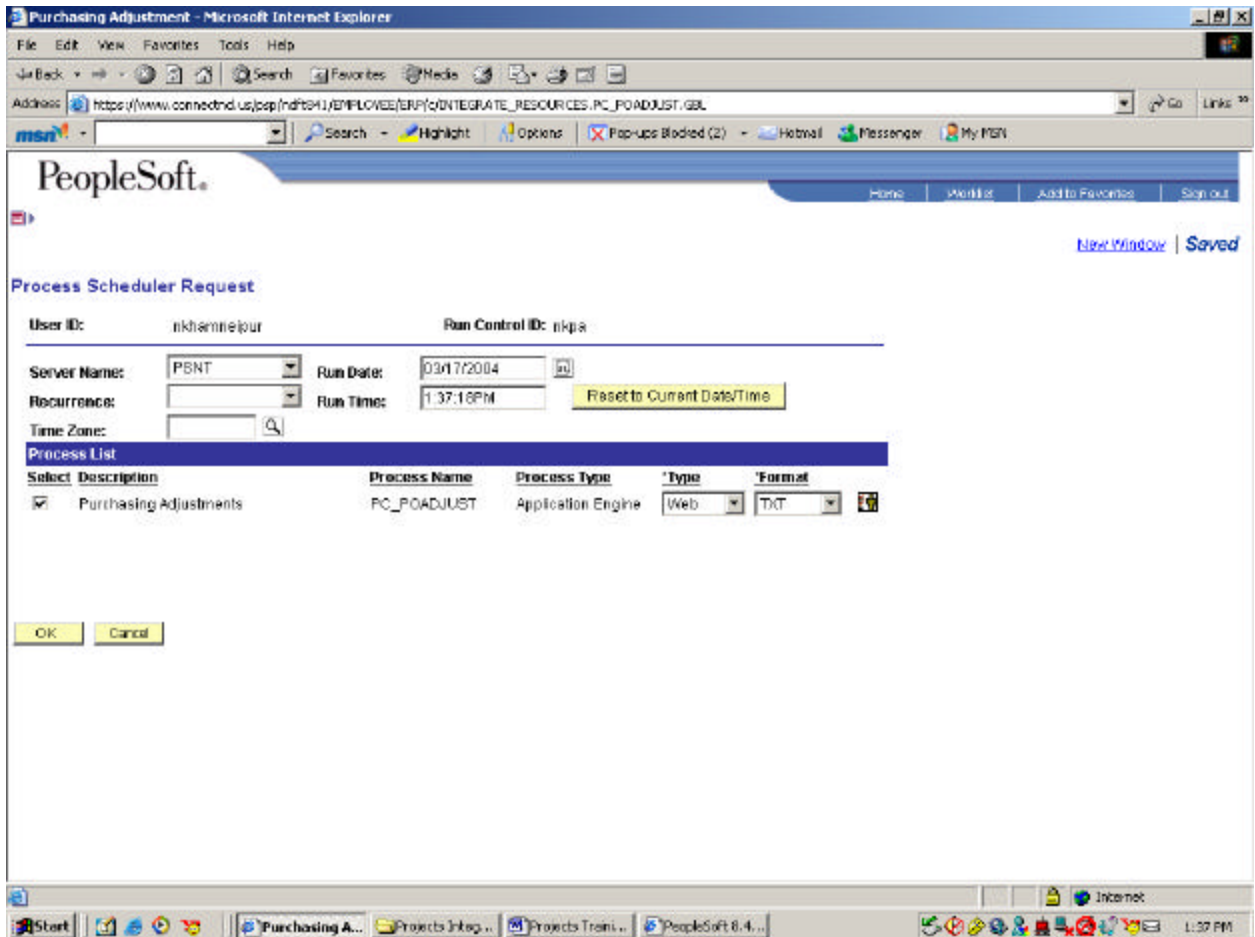
- Business Unit / Project Activity Option:
 - All
 - Selected Business Unit: Enter the appropriate Business Unit. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project: Enter the appropriate Business Unit and Project. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project / Activity: Enter the appropriate Business Unit, Project and Activity. Click the magnifying glass icon  to search for valid values.
- Date Type:
 - All
 - Accounting Date: Enter the appropriate Date Range.
 - Transaction Date: Enter the appropriate Date Range.
- Application Options:

- PO Close Adjustment: Creates a resource transaction with an Analysis Type of CCA (closed commitment adjustment).
- PO Reversals: Creates a resource transaction with an Analysis Type of CRV (commitment reversal).
- REQ Reversals: Creates a reversal transaction with an Analysis Type of RRV (requisition reversal).



- Click

Run



Process Scheduler Request

User ID: nkhammejour Run Control ID: nkpa

Server Name: PSNT Run Date: 03/17/2004

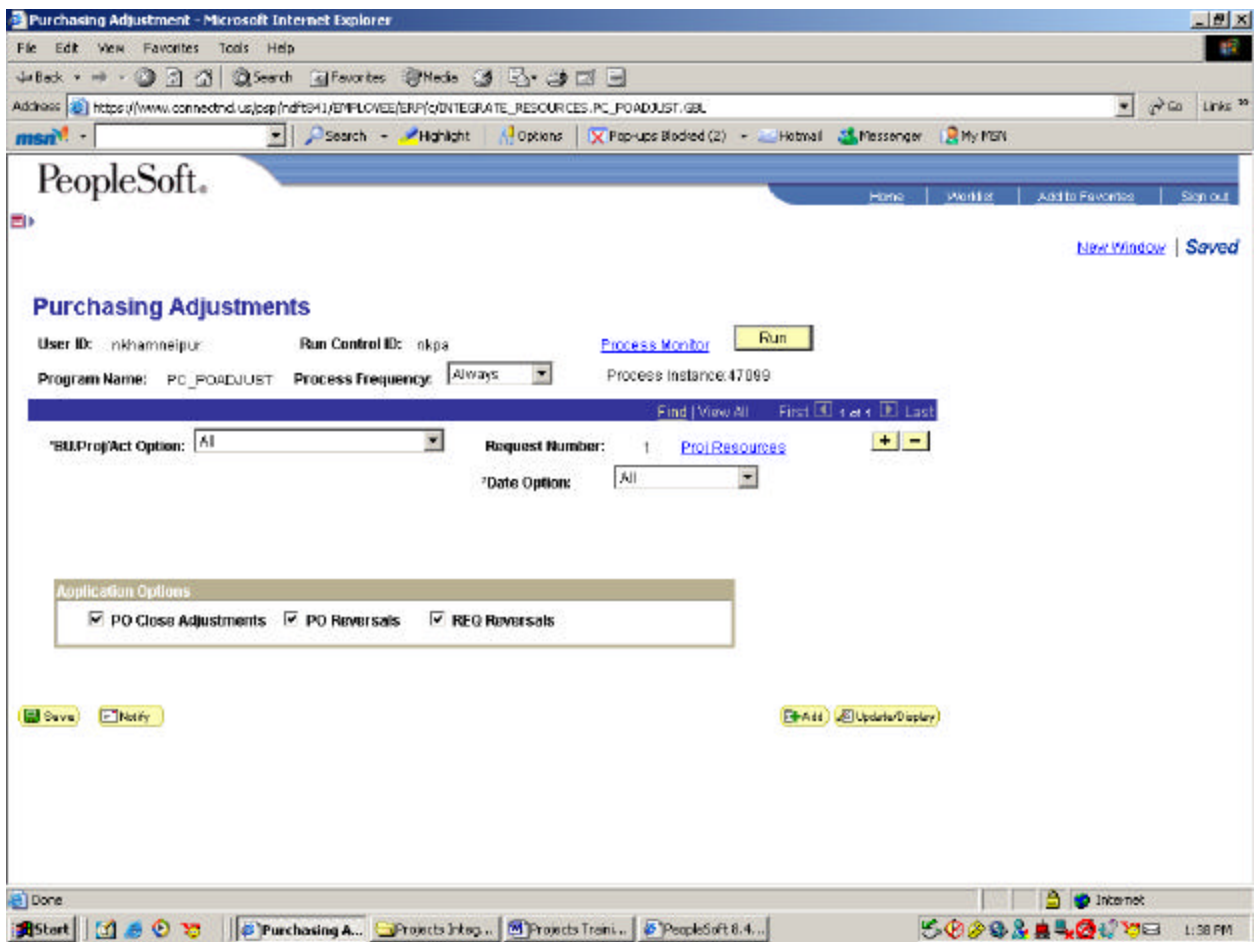
Recurrence: Run Times: 1:37:16PM [Reset to Current Date/Time](#)

Time Zone:

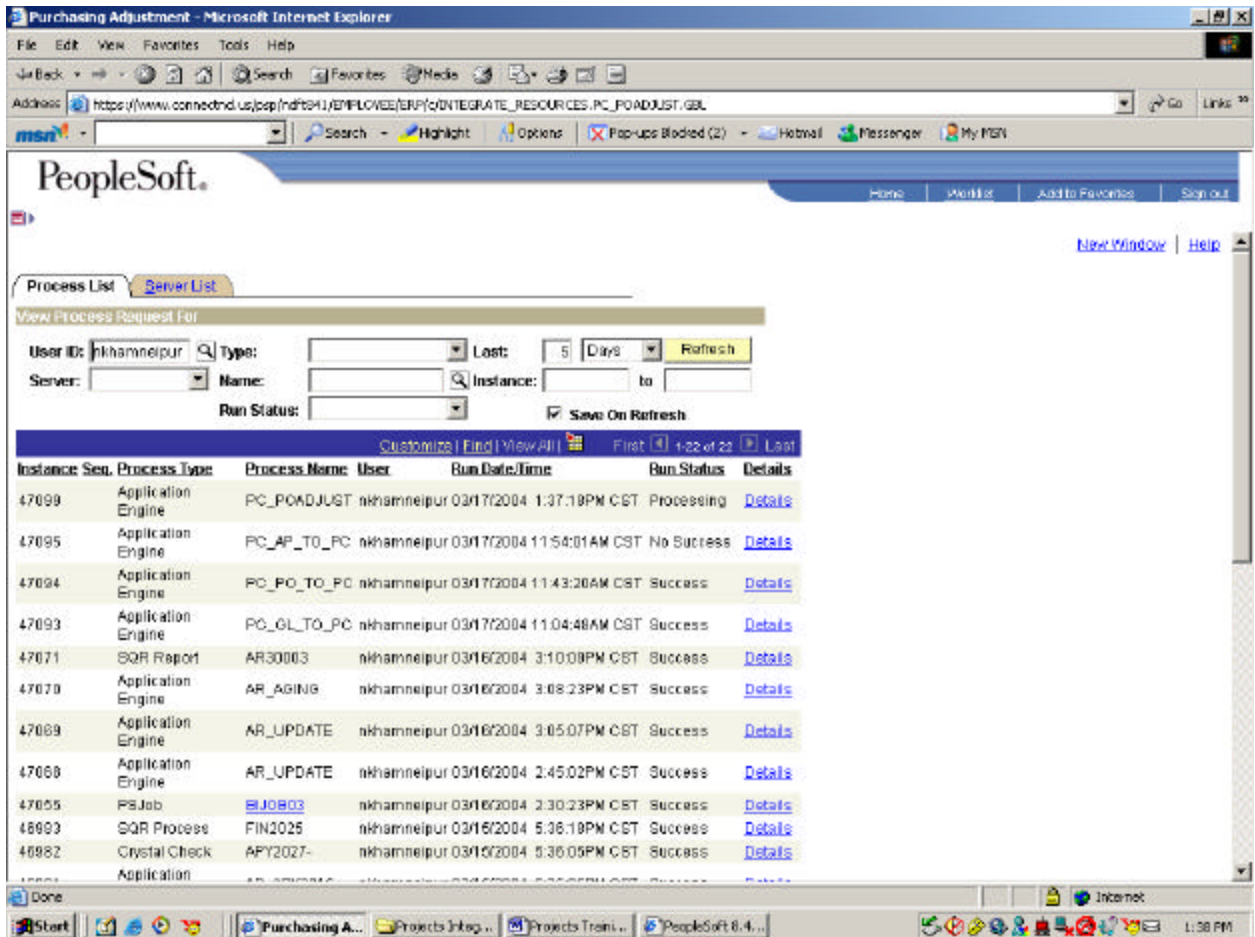
Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	Purchasing Adjustments	PC_POADJUST	Application Engine	Web	Text

[OK](#) [Cancel](#)

- Select the appropriate **Server Name:**
- Select the Purchasing Adjustments checkbox.
- Click [OK](#) to run the process.



- Click the [Process Monitor](#) hyperlink to view the status of the process.



Process List **Server List**

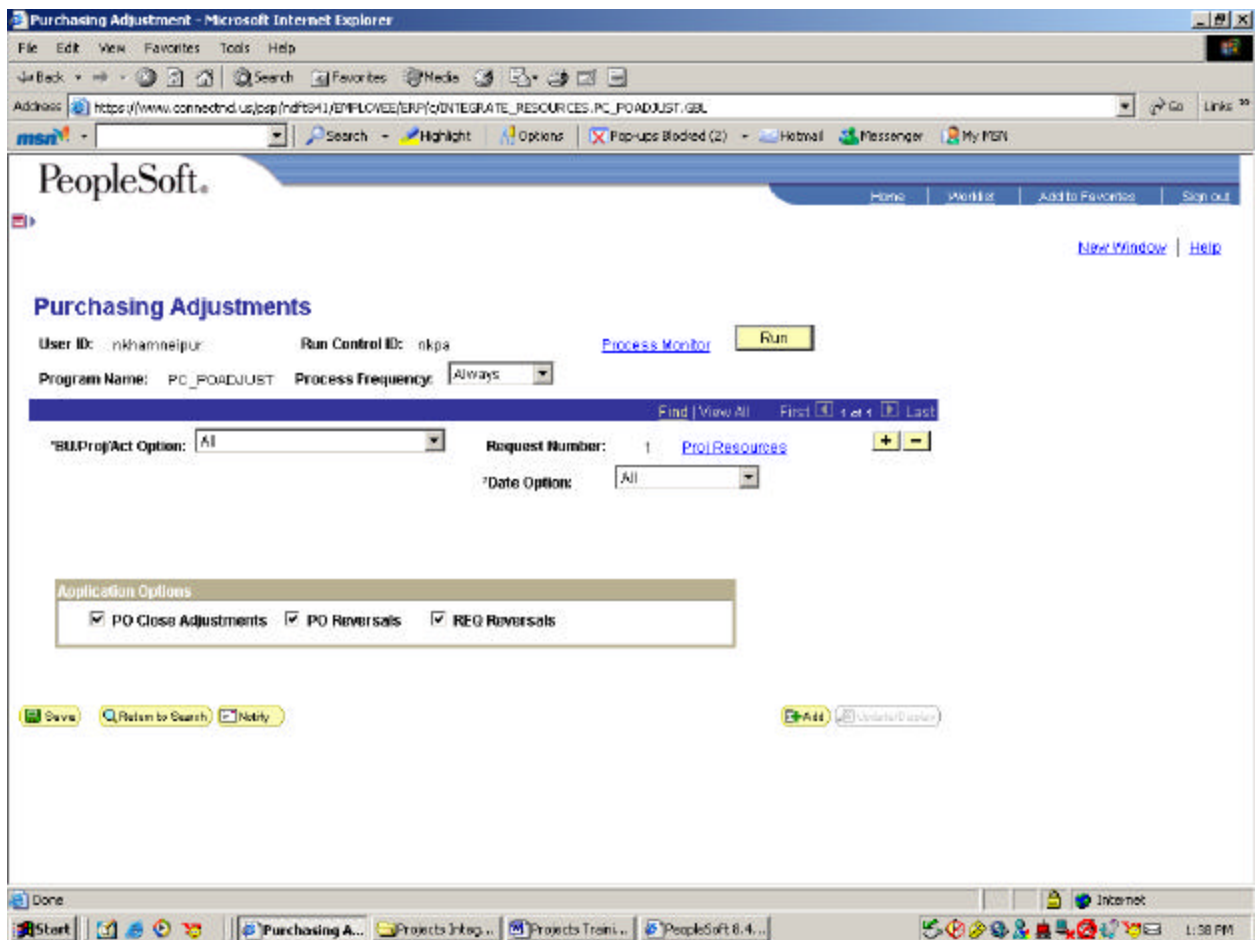
View Process Request For

User ID: nkhamneipur Type: Last: 5 Days Refresh

Server: Name: Instance: to Run Status: Save On Refresh

Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
47099	Application Engine	PC_POADJUST	nkhamneipur	03/17/2004 1:37:18PM CST	Processing	Details
47095	Application Engine	PC_AP_TO_PC	nkhamneipur	03/17/2004 11:54:01AM CST	No Success	Details
47094	Application Engine	PC_PO_TO_PC	nkhamneipur	03/17/2004 11:43:20AM CST	Success	Details
47093	Application Engine	PC_GL_TO_PC	nkhamneipur	03/17/2004 11:04:48AM CST	Success	Details
47071	SQR Report	AR30003	nkhamneipur	03/16/2004 3:10:08PM CST	Success	Details
47070	Application Engine	AR_AGING	nkhamneipur	03/16/2004 3:08:23PM CST	Success	Details
47069	Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 3:05:07PM CST	Success	Details
47068	Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 2:45:02PM CST	Success	Details
47055	PS Job	JOB03	nkhamneipur	03/16/2004 2:30:23PM CST	Success	Details
46993	SQR Process	FIN2025	nkhamneipur	03/16/2004 5:36:18PM CST	Success	Details
46982	Crystal Check	APY2027-	nkhamneipur	03/15/2004 5:36:05PM CST	Success	Details

- Click on [Go Back to Purchasing Adjustments](#) hyperlink to return to the process page.



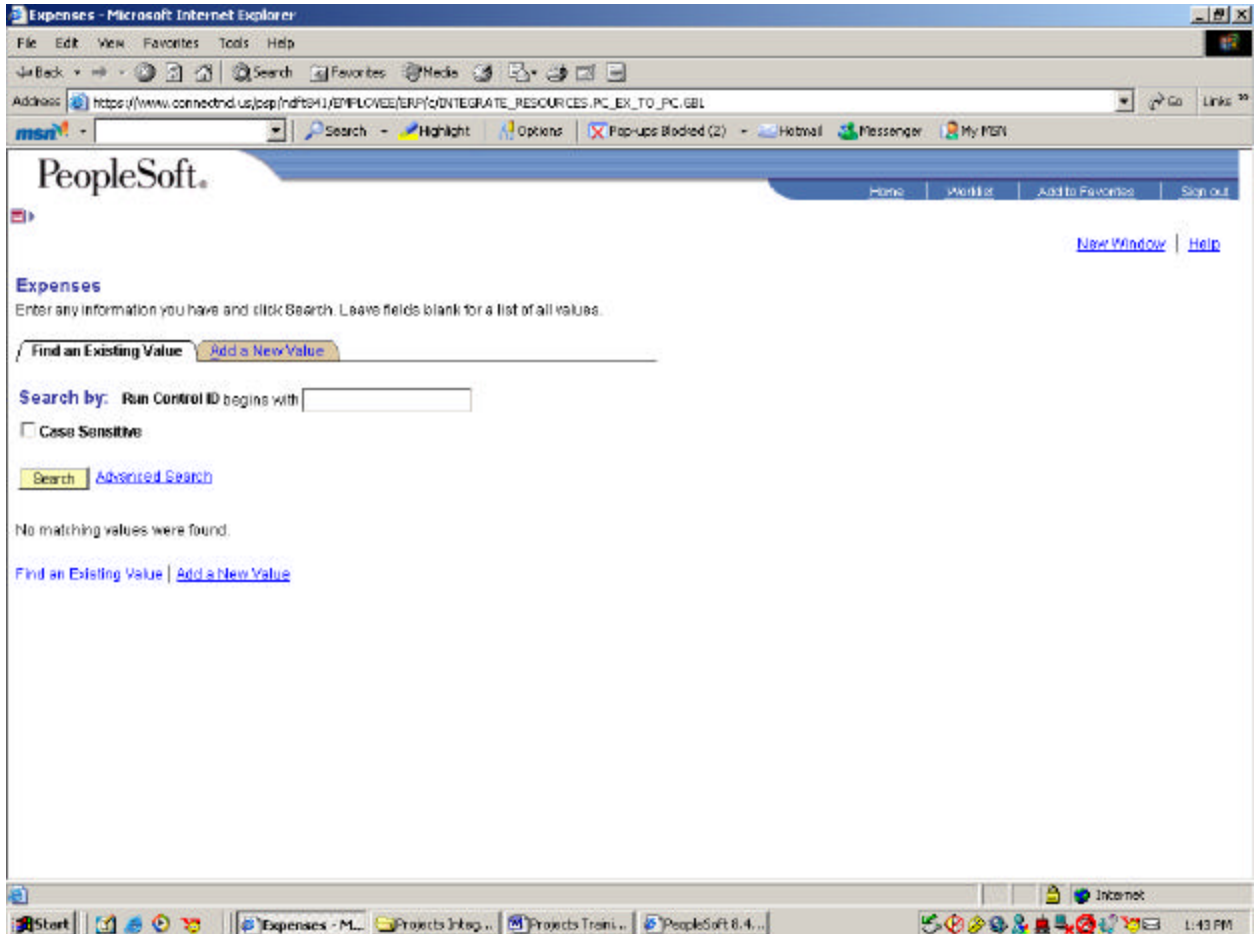
Note: This process will create 'RRV', 'CCA', 'CRV' analysis types depending on the Application Options.

Running the Expenses to Projects Process

- Once time reports have been entered and approved, the Expense Processes page is accessed to run the EX_TRAN_PRCs Application Engine process. By checking *Stage Time to Projects* on the Expense Processes page, the EX_TRAN_PRCs process calls the EX_PC_TM_STG Application Engine to stage time data to the EX_PROJ_RES_STG table. The PC_EX_TO_PC process can then be run to load data from the EX_PROJ_RES_STG table into PeopleSoft Projects.
- This process pulls approved time reports and expenses into PeopleSoft Projects from PeopleSoft Expenses.

Projects > Collect Costs > Expenses

- Enter your unique Run Control.



- If you do not have a Run Control established, please set one up using the 'Add a New Value' tab.

Expenses - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print

Address: https://www.connectnd.us/bsp/ndf0041/EMPLOYEE/EMP/q/INTEGRATE_RESOURCES.PC_EX_TO_PC.GBL

Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My PSN

PeopleSoft®

Home World Add to Favorites Sign out

New Window Help

Expenses

Find an Existing Value Add a New Value

Run Control ID: nkey

Program Name: PC_EX_TO_PC

Add


Find an Existing Value Add a New Value

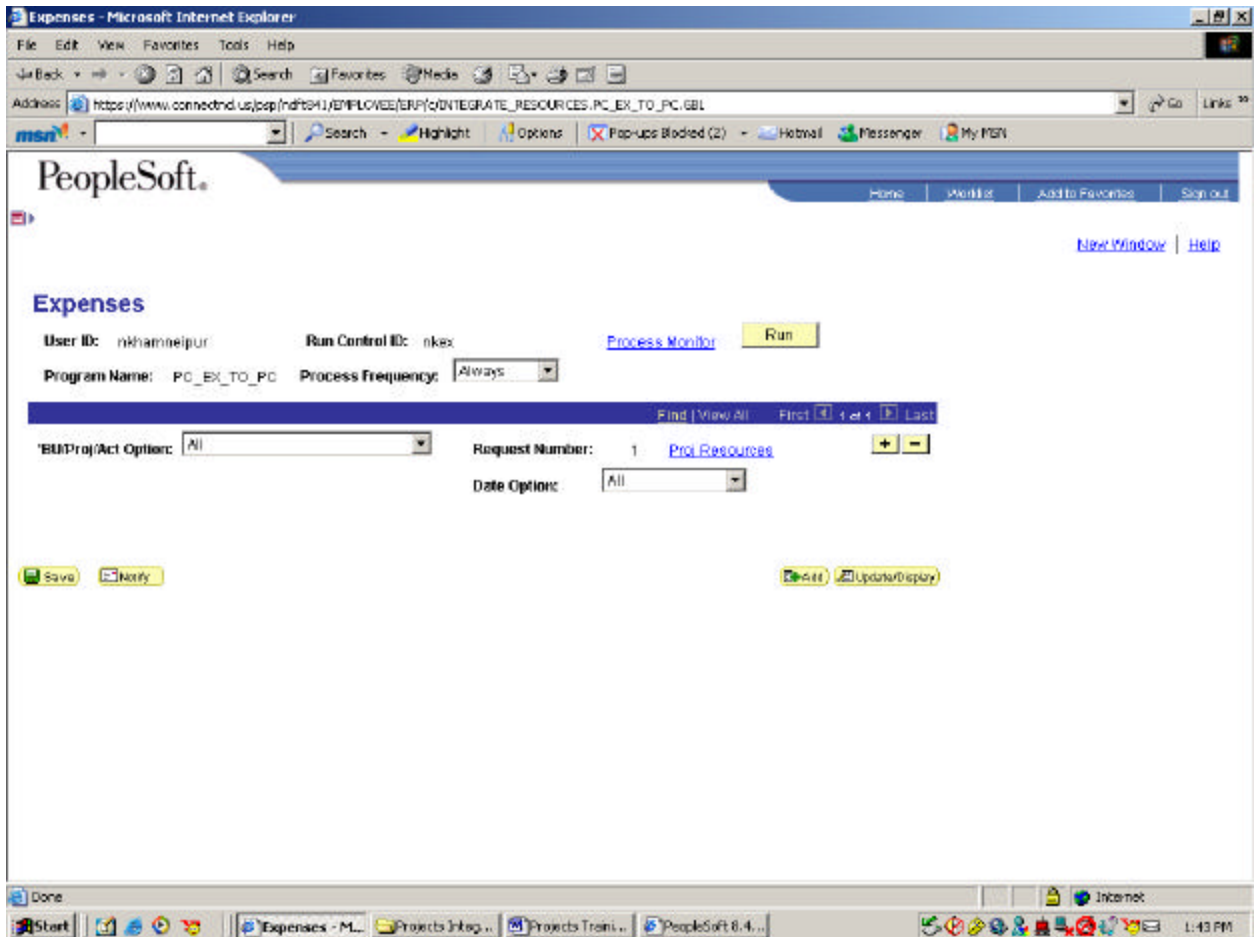
Done




Start Expenses - M... Projects Integ... Projects Train... PeopleSoft 8.4...

Internet

1:43 PM

- Enter your Run Control ID.
- Click .



- Business Unit / Project Activity Option:
 - All
 - Selected Business Unit: Enter the appropriate Business Unit. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project: Enter the appropriate Business Unit and Project. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project / Activity: Enter the appropriate Business Unit, Project and Activity. Click the magnifying glass icon  to search for valid values.
- Date Type:
 - All
 - Accounting Date: Enter the appropriate Date Range.
 - Transaction Date: Enter the appropriate Date Range.

Expenses - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print Mail

Address: https://www.connectnd.us/bsp/ndf0241/EMPLOYEE/EMP/q/INTEGRATE_RESOURCES.PC_EX_TO_PC.GBL

Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My PSN

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Home World Add to Favorites Sign out

New Window Help

Expenses

User ID: nkhamelapur Run Control ID: nkes [Process Monitor](#) **Run**

Program Name: PC_EX_TO_PC Process Frequency: Always

Find (View All) First 1 of 1 Last

BUIProj/Act Option: Selected Business Unit Request Number: 1 [Proc Resources](#)

Business Unit: 11 000 Date Option: All

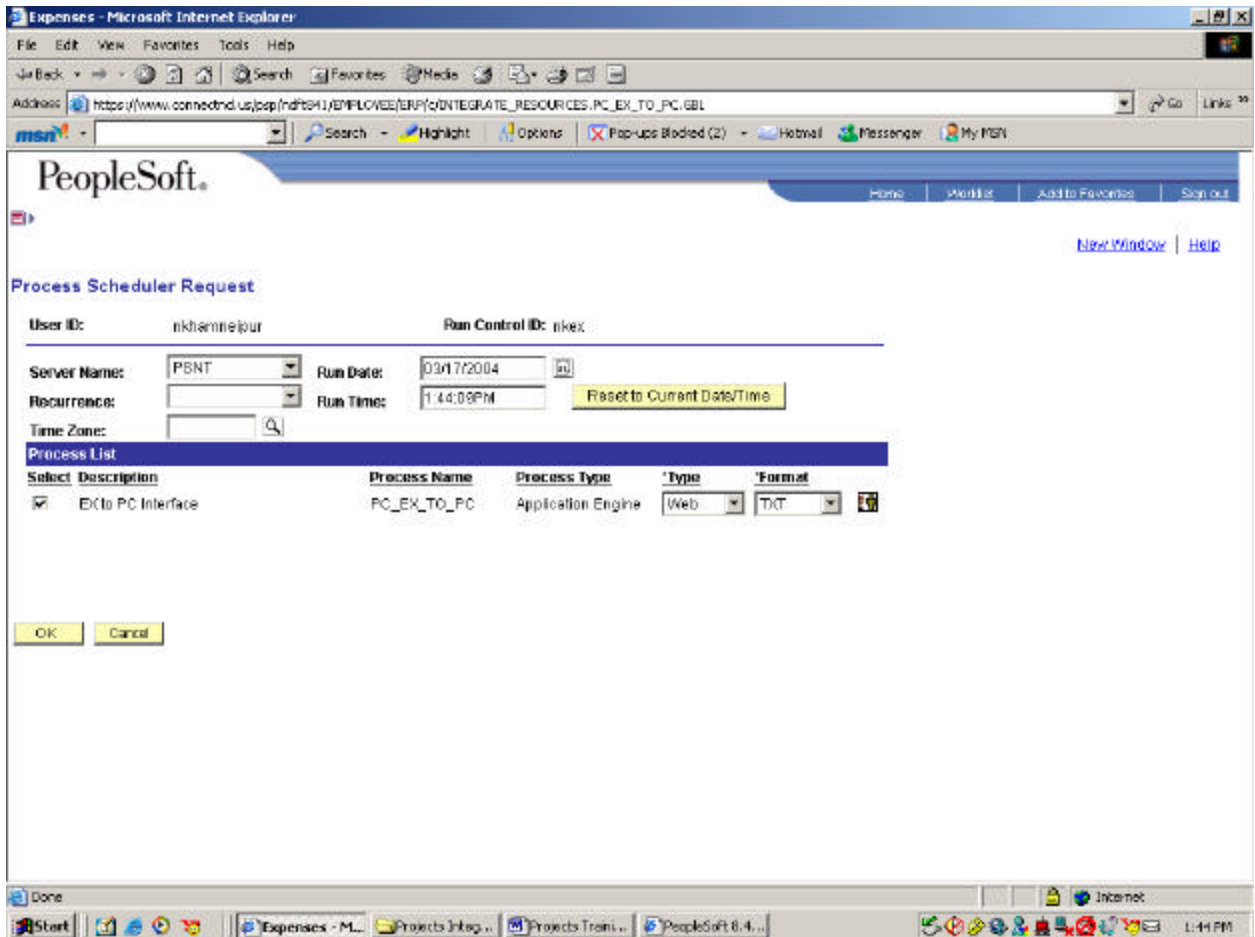
Save Notify Add Update/Display

Done

Start Expenses - M... Projects Integ... Projects Train... PeopleSoft 8.4...

Internet 1:44 PM

- Click **Run**



Expenses - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_EX_TO_PC.GBL

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Home World of Add to Favorites Sign out

New Window Help

Process Scheduler Request

User ID: nkhammejour Run Control ID: nkex

Server Name: PSNT Run Date: 03/17/2004

Recurrence: Run Times: 1:44:09PM Reset to Current Date/Time

Time Zone:

Process List

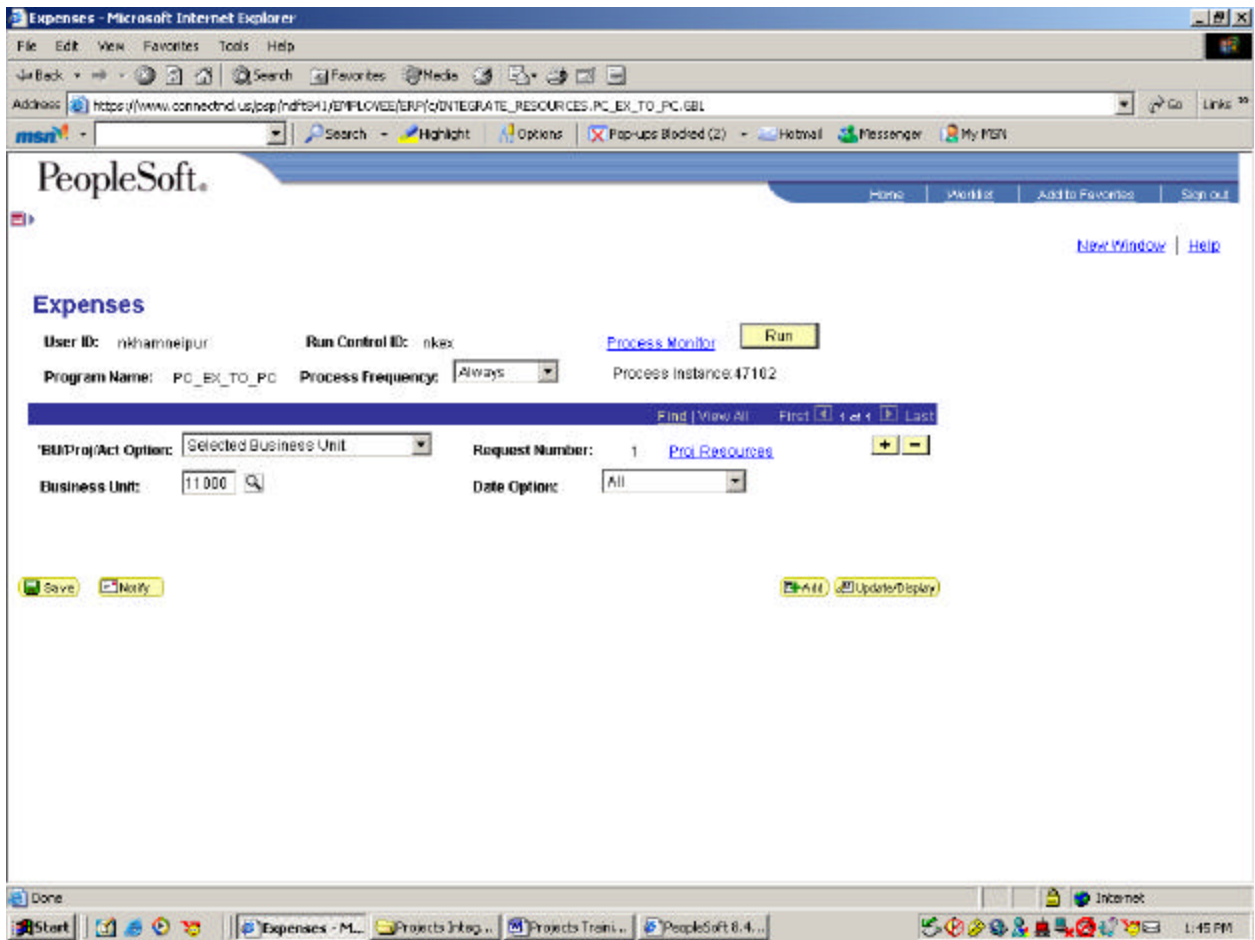
Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	EX to PC Interface	PC_EX_TO_PC	Application Engine	Web	Text

OK Cancel

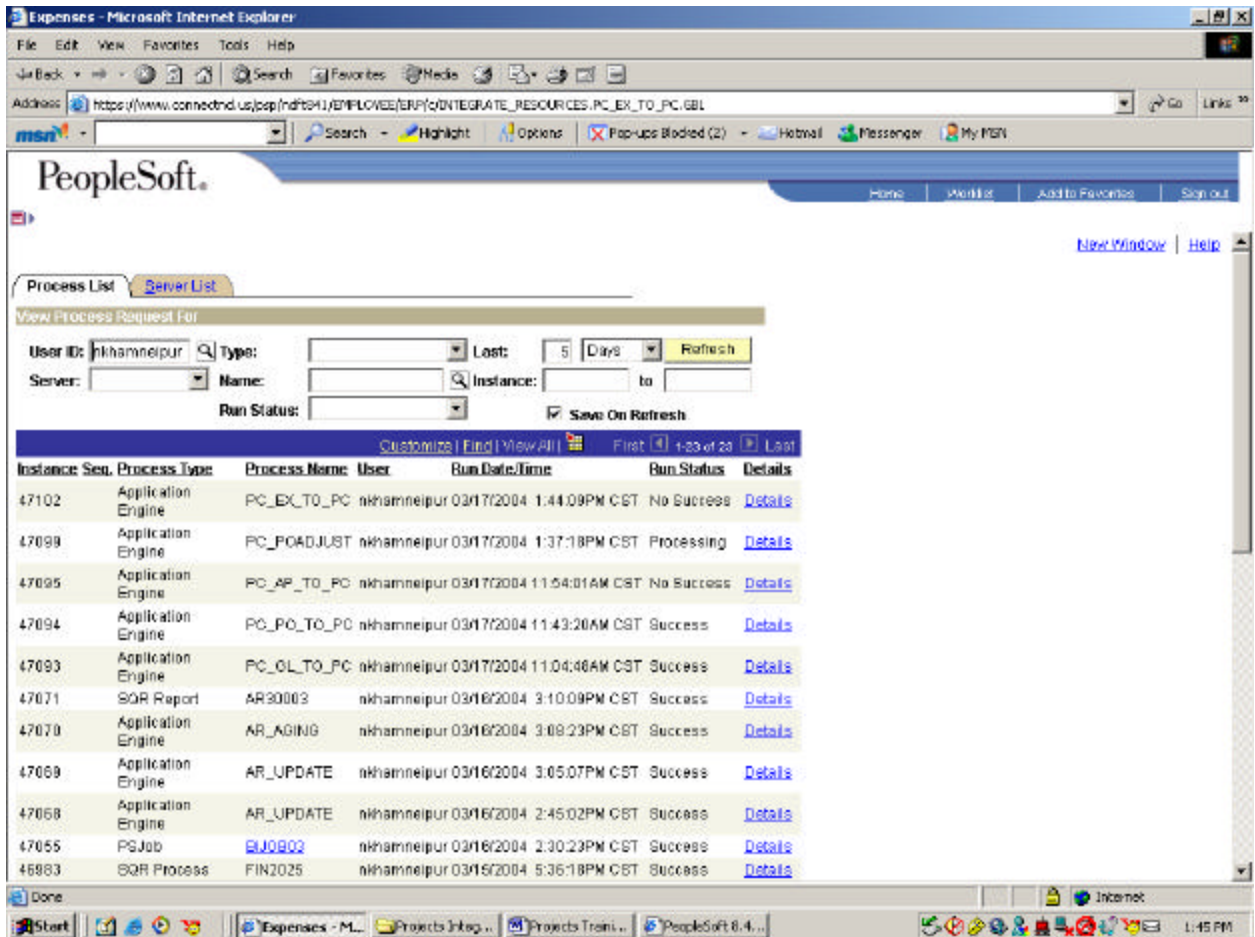
Done

Start Expenses - M... Projects Integ... Projects Train... PeopleSoft 8.4...

- Select the appropriate **Server Name:**
- Select the EX to PC Interface checkbox.
- Click to run the process.



- Click the [Process Monitor](#) hyperlink to view the status of the process.



The screenshot shows the PeopleSoft web interface in a Microsoft Internet Explorer browser window. The address bar displays the URL: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/DNTEGRATE_RESOURCES_PC_EX_TO_PC.GBL. The page title is "Expenses - Microsoft Internet Explorer".

The interface includes a "Process List" tab and a "Server List" tab. Below these tabs is a "View Process Request For" section with search filters:

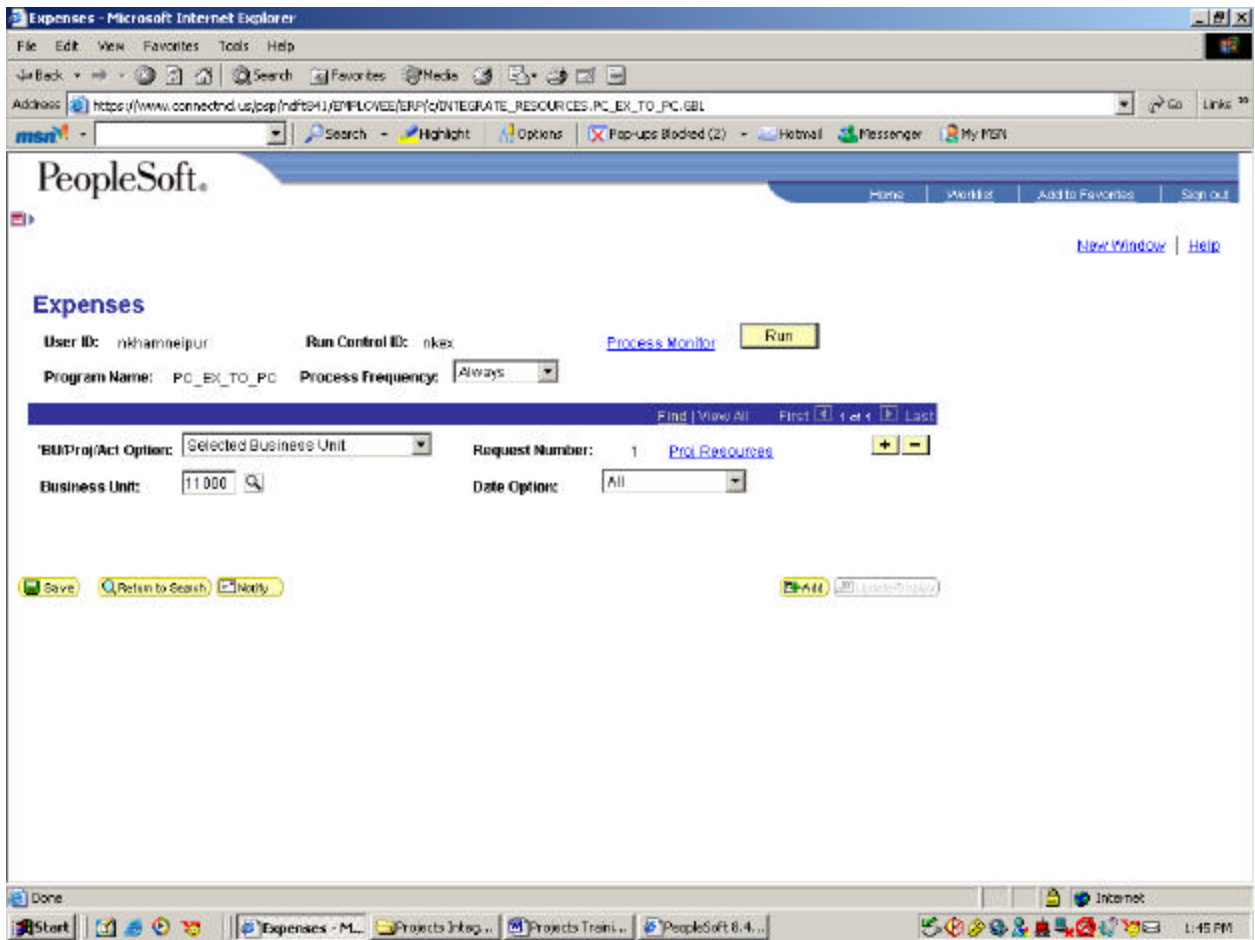
- User ID: Type: Last: Days
- Server: Name: Instance: to
- Run Status: ☒ Save On Refresh

Below the filters is a table with the following columns: Instance Seq., Process Type, Process Name, User, Run Date/Time, Run Status, and Details. The table contains 12 rows of process data.

Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
47102	Application Engine	PC_EX_TO_PC	nkhamneipur	03/17/2004 1:44:09PM CST	No Success	Details
47099	Application Engine	PC_POADJUST	nkhamneipur	03/17/2004 1:37:18PM CST	Processing	Details
47095	Application Engine	PC_AP_TO_PC	nkhamneipur	03/17/2004 11:54:01AM CST	No Success	Details
47094	Application Engine	PC_PO_TO_PC	nkhamneipur	03/17/2004 11:43:20AM CST	Success	Details
47093	Application Engine	PC_GL_TO_PC	nkhamneipur	03/17/2004 11:04:46AM CST	Success	Details
47071	SQR Report	AR30003	nkhamneipur	03/16/2004 3:10:09PM CST	Success	Details
47070	Application Engine	AR_AGING	nkhamneipur	03/16/2004 3:08:23PM CST	Success	Details
47069	Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 3:05:07PM CST	Success	Details
47068	Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 2:45:02PM CST	Success	Details
47055	PSJob	BJ0903	nkhamneipur	03/16/2004 2:30:23PM CST	Success	Details
46983	SQR Process	FIN2025	nkhamneipur	03/15/2004 5:35:18PM CST	Success	Details

The bottom of the screen shows the Windows taskbar with the Start button and several open applications: "Expenses - M...", "Projects Integ...", "Projects Trans...", and "PeopleSoft 8.4...". The system clock shows 1:45 PM.

- Click on [Go Back to Expenses](#) hyperlink to return to the process page.



Note: This process will create 'ACT' analysis types.

Running the Receivables to Projects Process

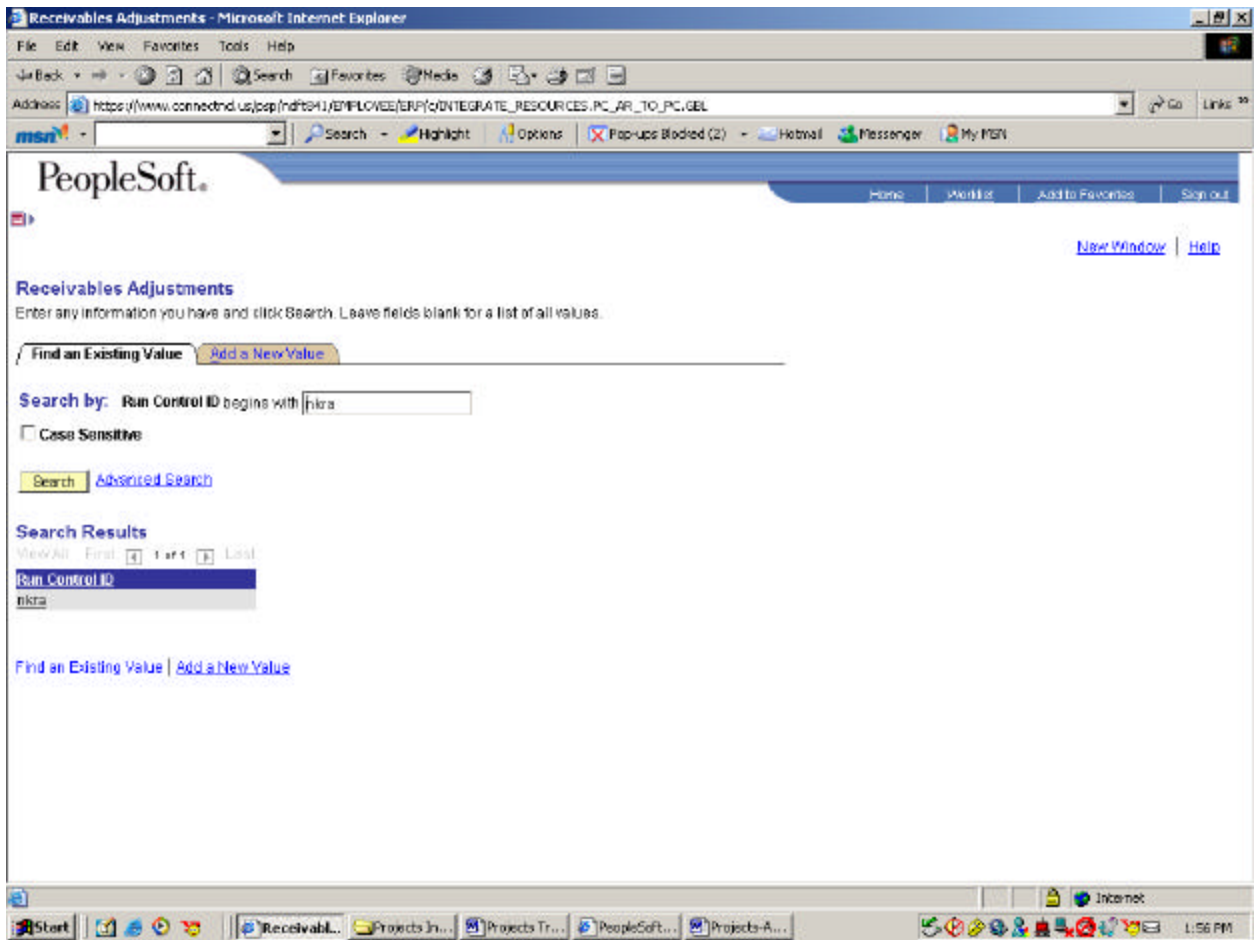
- The Receivables Adjustments Application Engine process, PC_AR_TO_PC, moves data from PeopleSoft Receivables to PeopleSoft Projects. Only entry types that relate to revenue adjustments are integrated back to PeopleSoft Projects.
- When you post an item, the receivables system flags the item as ready to distribute to PeopleSoft Projects by setting the PC_DISTRIB_STATUS flag on the PS_ITEM_ACTIVITY table to *N* (not distributed). When you run the Receivables Adjustments Application Engine in the project system, the process copies this information into PeopleSoft Projects and updates the PS_ITEM_ACTIVITY table to *D* (Done).

- PeopleSoft Accounts Receivable / Billing Entry Types that integrate with Projects include:

Entry Type	Description
IT-01	Create an invoice/debit memo.
IT-02	Create a credit memo.
MT-03	Write-off a debit.
MT-04	Create a new debit.
MT-07	Write-off remaining debit.
WS-03	Take earned discount.
WS-04	Take unearned discount.
WS-07	Adjust remaining underpayment.
WS-08	Create a deduction.
WS-09	Write off an item
WS-11	Write off an underpayment.

Projects > Collect Revenue > Revenue Adjustments

- Enter your unique Run Control.



- If you do not have a Run Control established, please set one up using the 'Add a New Value' tab.

Receivables Adjustments - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_AR_TO_PC.GBL

msn Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My MSN

PeopleSoft® Home World Add to Favorites Sign out

[New Window](#) [Help](#)

Receivables Adjustments

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

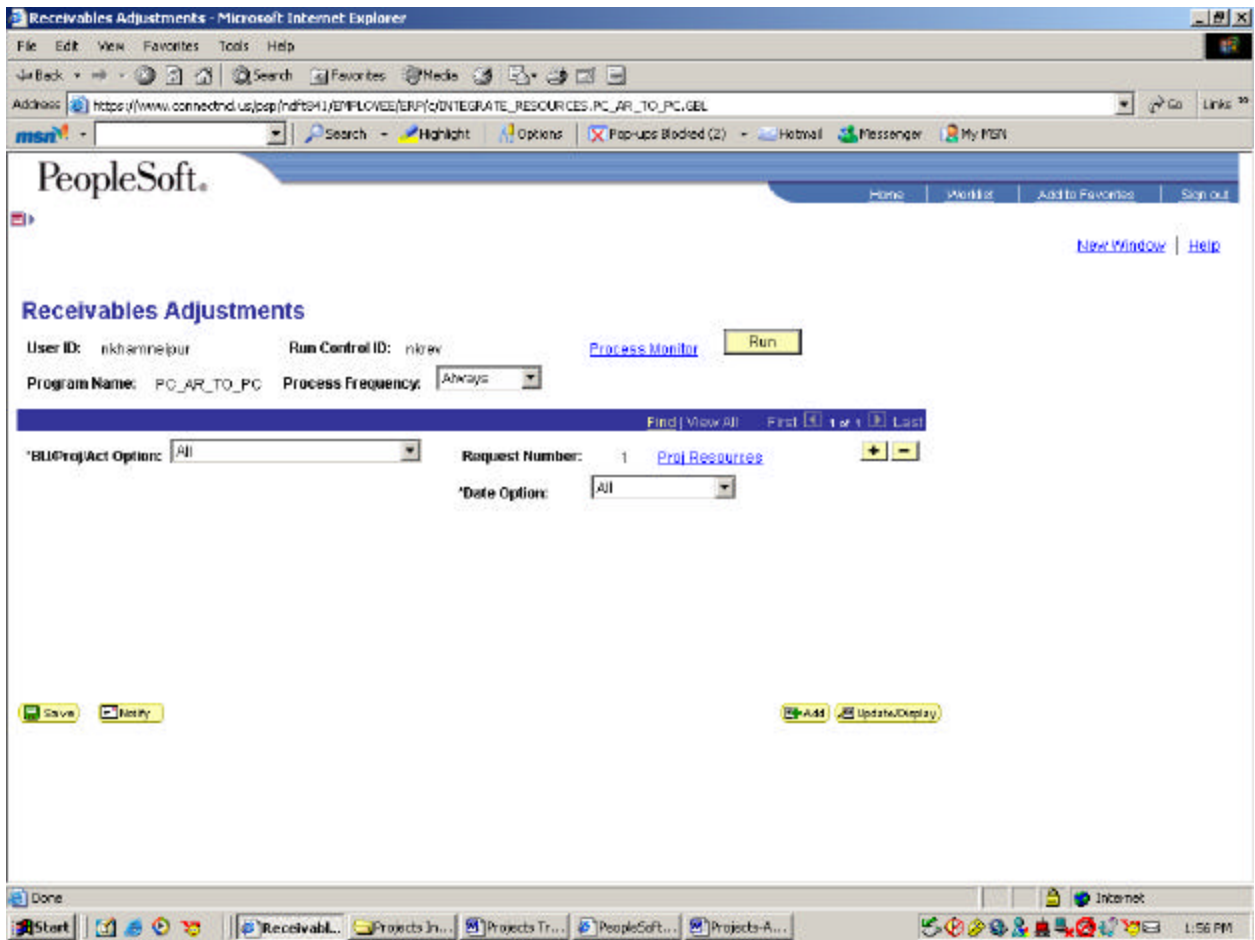
Program Name:

[Find an Existing Value](#) [Add a New Value](#)

Done

Start Internet 1:56 PM

- Enter your Run Control ID.
- Click .



Receivables Adjustments - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/bsp/fndf041/EMPLOYEE/EMP/CNTEGRATE_RESOURCES.PC_AR_TO_PC.GBL

PeopleSoft

Home World Add to Favorites Sign out

New Window Help

Receivables Adjustments

User ID: nkhamneipur Run Control ID: nkrev [Process Monitor](#) [Run](#)

Program Name: PC_AR_TO_PC Process Frequency: Always

Find View All First 1 of 1 Last

*BU/Proj/Act Option: All Request Number: 1 [Proj Resources](#) + -




*Date Option: All

Save Notify A44 Update/Display

Done

Start Receivabl... Projects In... Projects Tr... PeopleSoft... Projects-A...

1:56 PM

- Business Unit / Project Activity Option:
 - All
 - Selected Business Unit: Enter the appropriate Business Unit. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project: Enter the appropriate Business Unit and Project. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project / Activity: Enter the appropriate Business Unit, Project and Activity. Click the magnifying glass icon  to search for valid values.
- Date Type:
 - All
 - Accounting Date: Enter the appropriate Date Range.
 - Transaction Date: Enter the appropriate Date Range.

Receivables Adjustments - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_AR_TO_PC.GBL

msn Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My MSN

PeopleSoft® Home World of Add to Favorites Sign out

New Window Help

Receivables Adjustments

User ID: nkhamneipur Run Control ID: nkrev [Process Monitor](#) [Run](#)

Program Name: PC_AR_TO_PC Process Frequency: Always

Find | View All First 1 of 1 Last

*BU/Project Option: Selected Business Unit Request Number: 1 [Proj Resources](#)

Business Unit: 11000 *Date Option: All

Save Notify [Add](#) [Update/Display](#)

Done

Start | Receivabl... Projects In... Projects Tr... PeopleSoft... Projects-A...

Internet 1:57 PM

- Click [Run](#)

Receivables Adjustments - Microsoft Internet Explorer

Address: https://www.connectnd.us/bsp/fndf041/EMPLOYEE/EMP/q/INTEGRATE_RESOURCES.PC_AR_TO_PC.GBL

PeopleSoft.

Home | World | Add to Favorites | Sign out

[New Window](#) | [Help](#)

Process Scheduler Request

User ID: nkhamtejour Run Control ID: nkrev

Server Name: PSNT Run Date: 03/17/2004 [su]

Recurrence: Run Time: 1:57:21 PM [Reset to Current Date/Time](#)

Time Zone: [v]

Process List

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	Revenue Adjustments	PC_AR_TO_PC	Application Engine	Web	TXT

[OK](#) [Cancel](#)

Done

Start | Receivabl... | Projects In... | Projects Tr... | PeopleSoft... | Projects-A...

Internet

1:58 PM

- Select the appropriate **Server Name:**
- Select the Revenue Adjustments checkbox.
- Click [OK](#) to run the process.

Receivables Adjustments - Microsoft Internet Explorer

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_AR_TO_PC.GBL

PeopleSoft®

Home | World of | Add to Favorites | Sign out

[New Window](#) | [Saved](#)

Receivables Adjustments

User ID: nkhamneipour Run Control ID: nkrev [Process Monitor](#) [Run](#)

Program Name: PC_AR_TO_PC Process Frequency: Always Process Instance: 47106

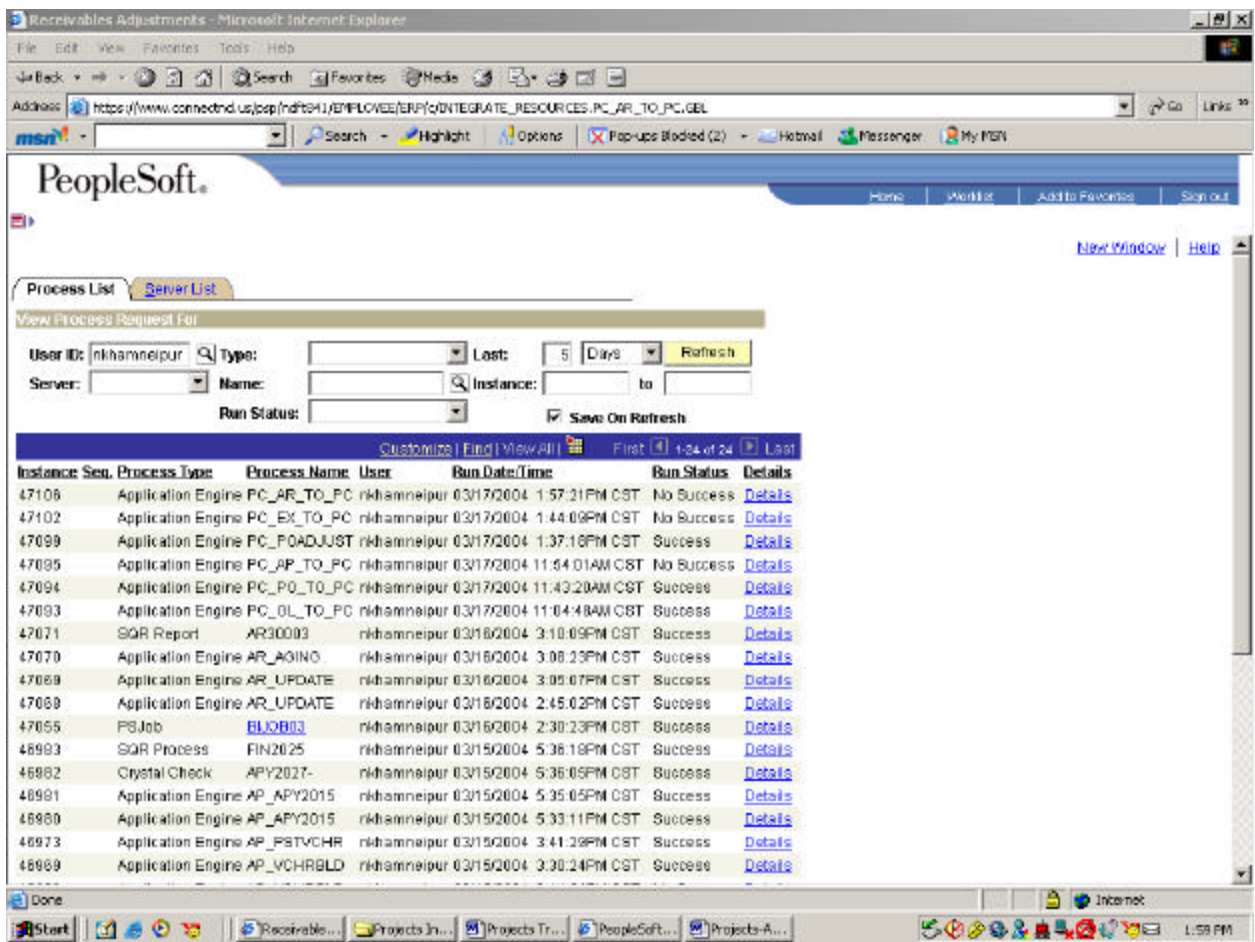
Find | View All First | 1 of 1 | Last

*BUProjAct Option: Selected Business Unit Request Number: 1 [Proj Resources](#)

Business Unit: 11000 *Date Option: All

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

- Click the [Process Monitor](#) hyperlink to view the status of the process.



Receivables Adjustments - Microsoft Internet Explorer

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/EMP/CYQINTEGRATE_RESOURCES/PC_AR_TO_PC.GBL

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Process List Server List

View Process Request for

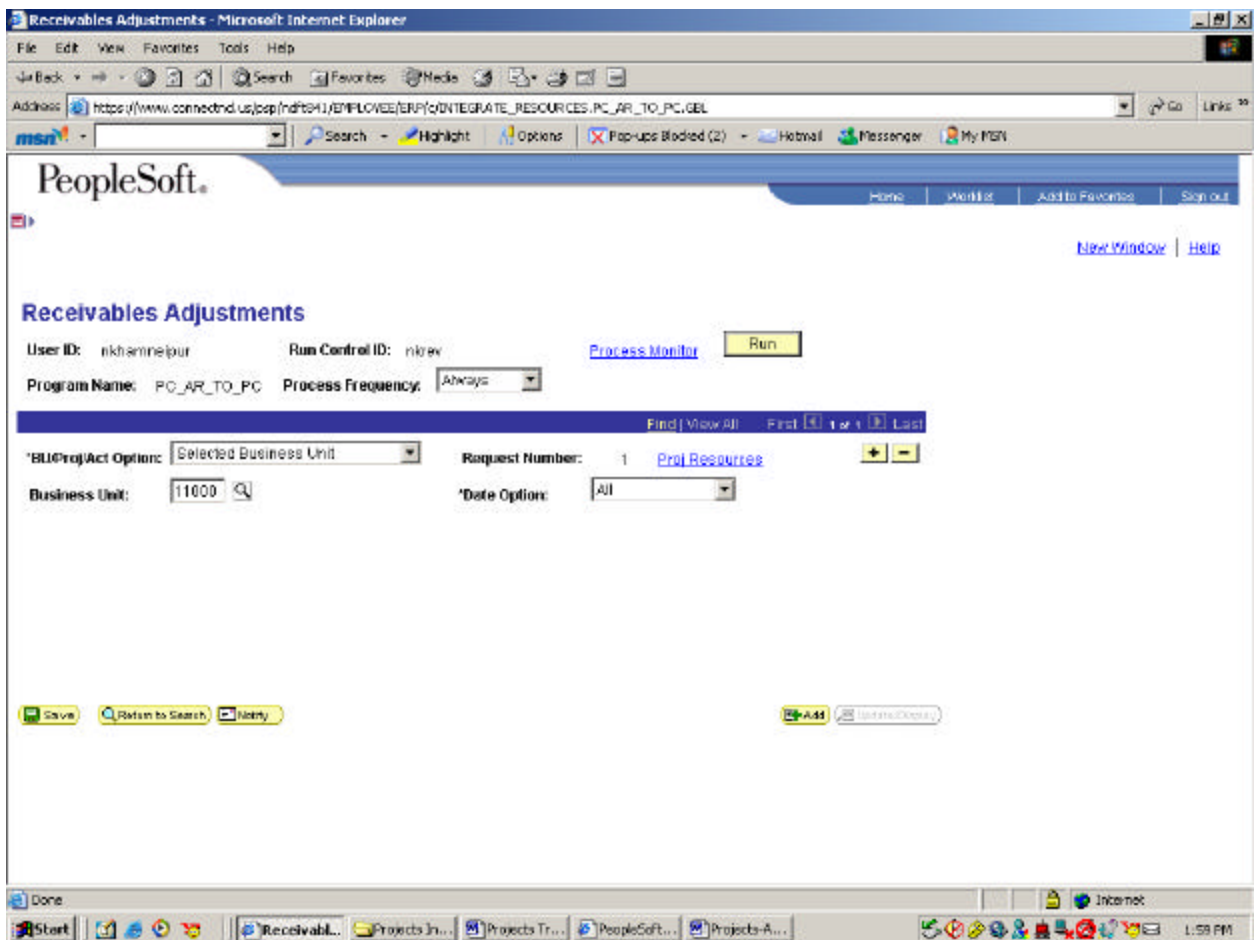
User ID: nkhamneipur Type: Last: 5 Days Refresh

Server: Name: Instance: to

Run Status: Save On Refresh

Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Details
47106		Application Engine	PC_AR_TO_PC	nkhamneipur	03/17/2004 1:57:21PM CST	No Success	Details
47102		Application Engine	PC_EX_TO_PC	nkhamneipur	03/17/2004 1:44:09PM CST	No Success	Details
47099		Application Engine	PC_POADJUST	nkhamneipur	03/17/2004 1:37:16PM CST	Success	Details
47095		Application Engine	PC_AP_TO_PC	nkhamneipur	03/17/2004 11:54:01AM CST	No Success	Details
47094		Application Engine	PC_PO_TO_PC	nkhamneipur	03/17/2004 11:43:20AM CST	Success	Details
47093		Application Engine	PC_OL_TO_PC	nkhamneipur	03/17/2004 11:04:48AM CST	Success	Details
47071		SQR Report	AR30003	nkhamneipur	03/16/2004 3:10:09PM CST	Success	Details
47070		Application Engine	AR_A3INO	nkhamneipur	03/16/2004 3:08:23PM CST	Success	Details
47069		Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 3:05:07PM CST	Success	Details
47068		Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 2:45:02PM CST	Success	Details
47055		PSJob	BLU0003	nkhamneipur	03/16/2004 2:30:23PM CST	Success	Details
46993		SQR Process	FIN2025	nkhamneipur	03/15/2004 5:36:18PM CST	Success	Details
46982		Crystal Check	APY2027-	nkhamneipur	03/15/2004 5:36:05PM CST	Success	Details
46981		Application Engine	AP_APY2015	nkhamneipur	03/15/2004 5:35:05PM CST	Success	Details
46980		Application Engine	AP_APY2015	nkhamneipur	03/15/2004 5:33:11PM CST	Success	Details
46973		Application Engine	AP_TVCHR	nkhamneipur	03/15/2004 3:41:28PM CST	Success	Details
46969		Application Engine	AP_VCHRBLD	nkhamneipur	03/15/2004 3:30:24PM CST	Success	Details

- Click on [Go Back to Receivable Adjustments](#) hyperlink to return to the process page.



Note: This process will create 'REV' analysis types. Negative REV transactions filter to Projects if the item has been written off or refunded in Accounts Receivable.

Running the Inventory to Projects Process

-

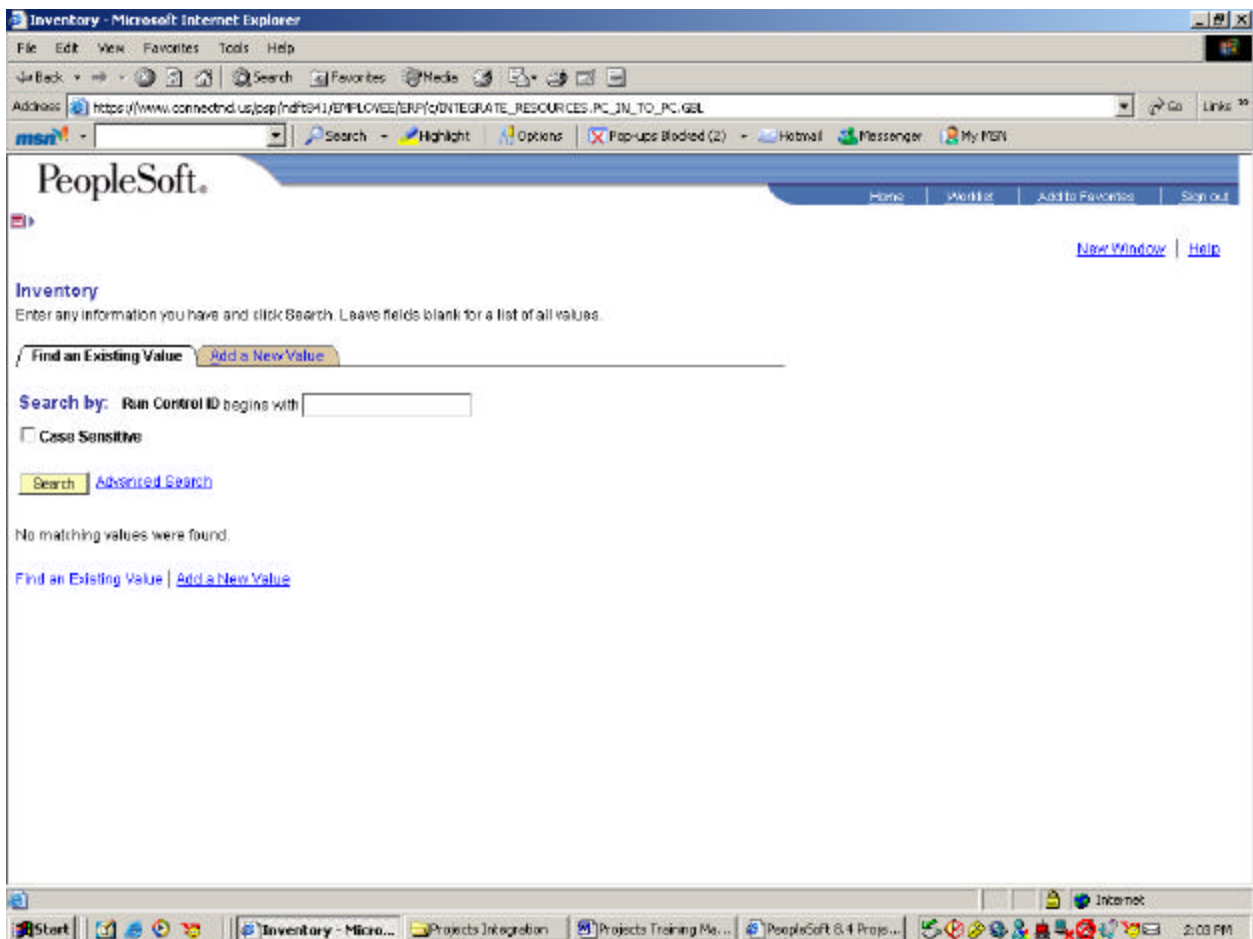
Following are actions that occur to integrate demand between PeopleSoft Projects and PeopleSoft Inventory:

- If a requisitioned item is an inventory item, PeopleSoft Purchasing can check purchasing availability or create a demand and place it on the DEMAND_INF_INV table where PeopleSoft Inventory picks it up.
- If PeopleSoft Inventory cannot fulfill the demand, it is sent back so that PeopleSoft Purchasing can generate a purchase order or backorder the demand.
- If the demand can be fulfilled, the requested items are assigned to the project ID identified on the demand.

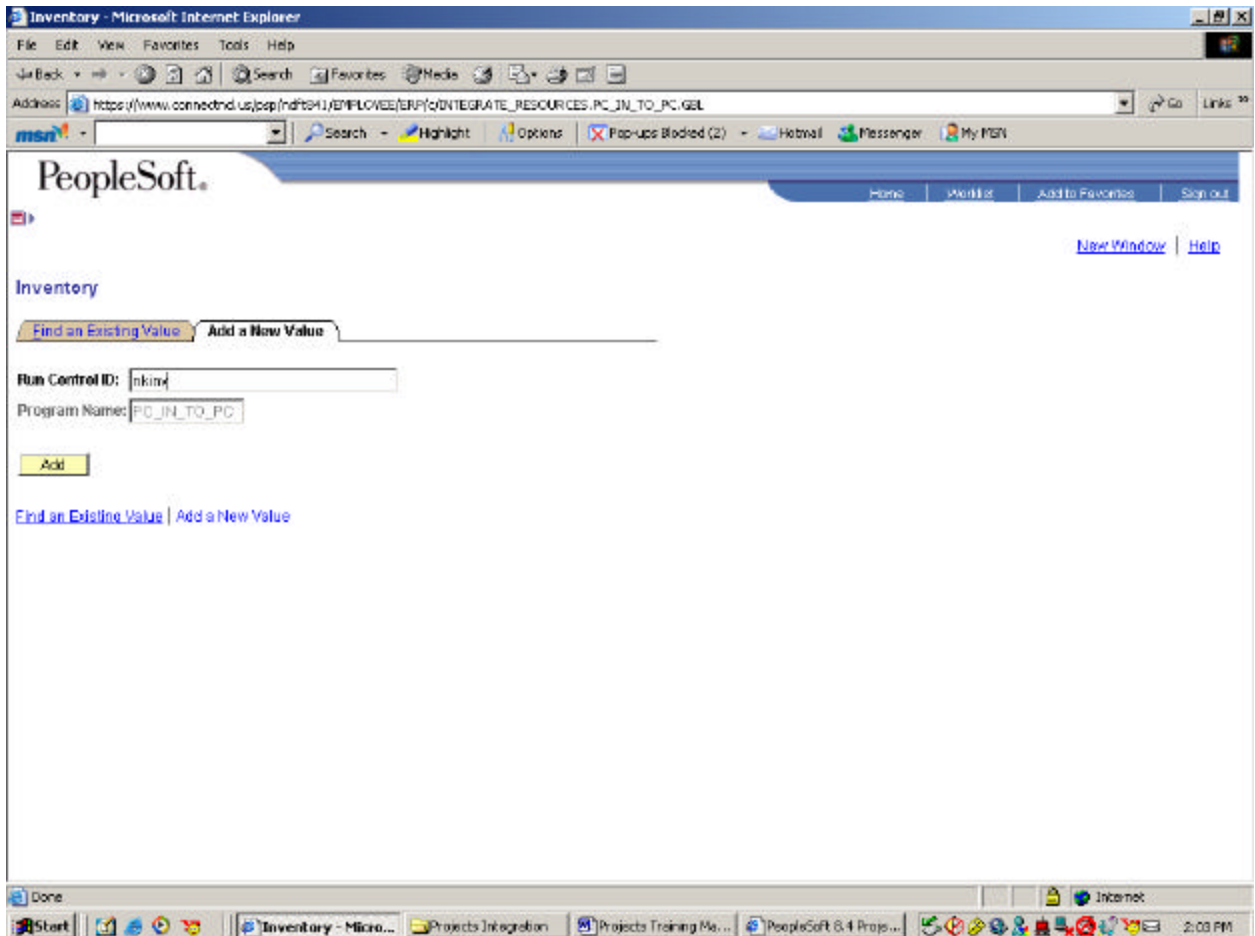
- The fulfilled demand is placed via Inventory Costing on the CM_ACCTG_LINE table where it can be picked up by PeopleSoft Projects and brought in as a resource transaction with an analysis type of ACT (actual costs). The Inventory to Projects Interface process copies fulfilled demands where the PC_DISTRIB_STATUS is set to N from the CM_ACCTG_LINE table to the PROJ_RESOURCE table.
- This process changes the PC_DISTRIB_STATUS of the transactions in the CM_ACCTG_LINE table to D, indicating that they have been picked up by PeopleSoft Projects.
- Fulfilled demands are brought into PeopleSoft Projects as resource transactions with an analysis type of ACT.


Projects > Collect Costs > Inventory

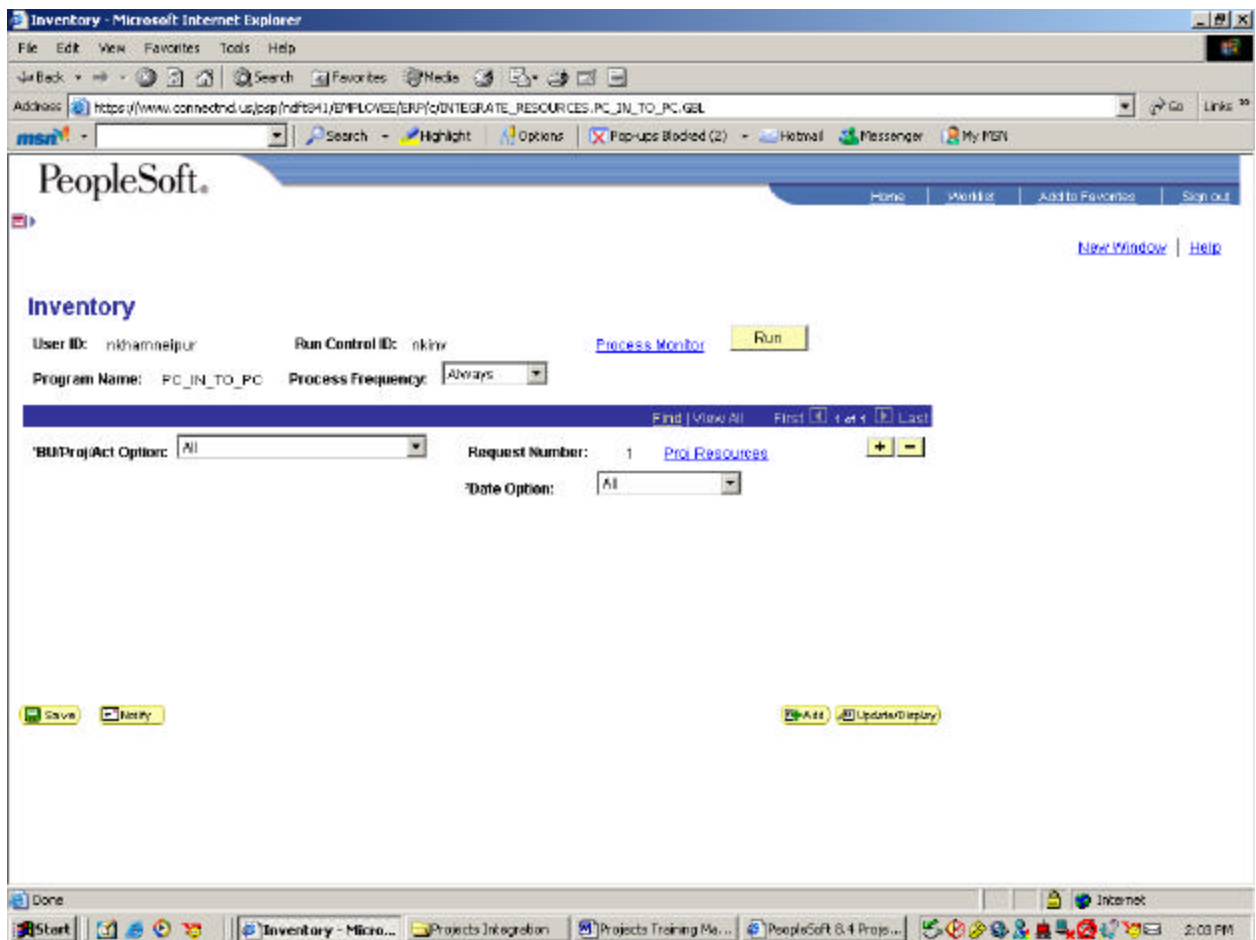
- Enter your unique Run Control.






- If you do not have a Run Control established, please set one up using the 'Add a New Value' tab.



- Enter your Run Control ID.
- Click .



- Business Unit / Project Activity Option:
 - All
 - Selected Business Unit: Enter the appropriate Business Unit. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project: Enter the appropriate Business Unit and Project. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project / Activity: Enter the appropriate Business Unit, Project and Activity. Click the magnifying glass icon  to search for valid values.
- Date Type:
 - All
 - Accounting Date: Enter the appropriate Date Range.
 - Transaction Date: Enter the appropriate Date Range.

Inventory - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_IN_TO_PC_GEL

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New Window Help

Inventory

User ID: nkhannelpur Run Control ID: nkhnr [Process Monitor](#) **Run**

Program Name: PC_IN_TO_PC Process Frequency: Always

Find View All First Previous Next Last

Business Unit: 11000 Request Number: 1 [Proj Resources](#)

Date Option: All

Save Notify Add Update/Display

Start Inventory - Micro... Projects Integration Projects Training Me... PeopleSoft 8.4 Proj... 2:04 PM

- Click

Run

Process Scheduler Request

User ID: nkhamtejour Run Control ID: nkjrv

Server Name: PSNT Run Date: 03/17/2004

Recurrence: Run Time: 2:03:47PM [Reset to Current Date/Time](#)

Time Zone:

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	IN to PC Interface	PC_IN_TO_PC	Application Engine	Web	TXT

[OK](#) [Cancel](#)

- Select the appropriate **Server Name:**
- Select the IN to PC Interface checkbox.
- Click [OK](#) to run the process.

Inventory - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/psp/ndftsm1/EMPLOYEE/ERP/CD/INTEGRATE_RESOURCES/PC_IN_TO_PC.GBL

msn Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My PSN

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Home Monitor Add to Favorites Sign out

[New Window](#) [Saved](#)

Inventory

User ID: nkhamnelpur Run Control ID: nkhr [Process Monitor](#)

Program Name: PC_IN_TO_PC Process Frequency: Always Process Instance: 47107

Find | View All First 4 of 4 Last

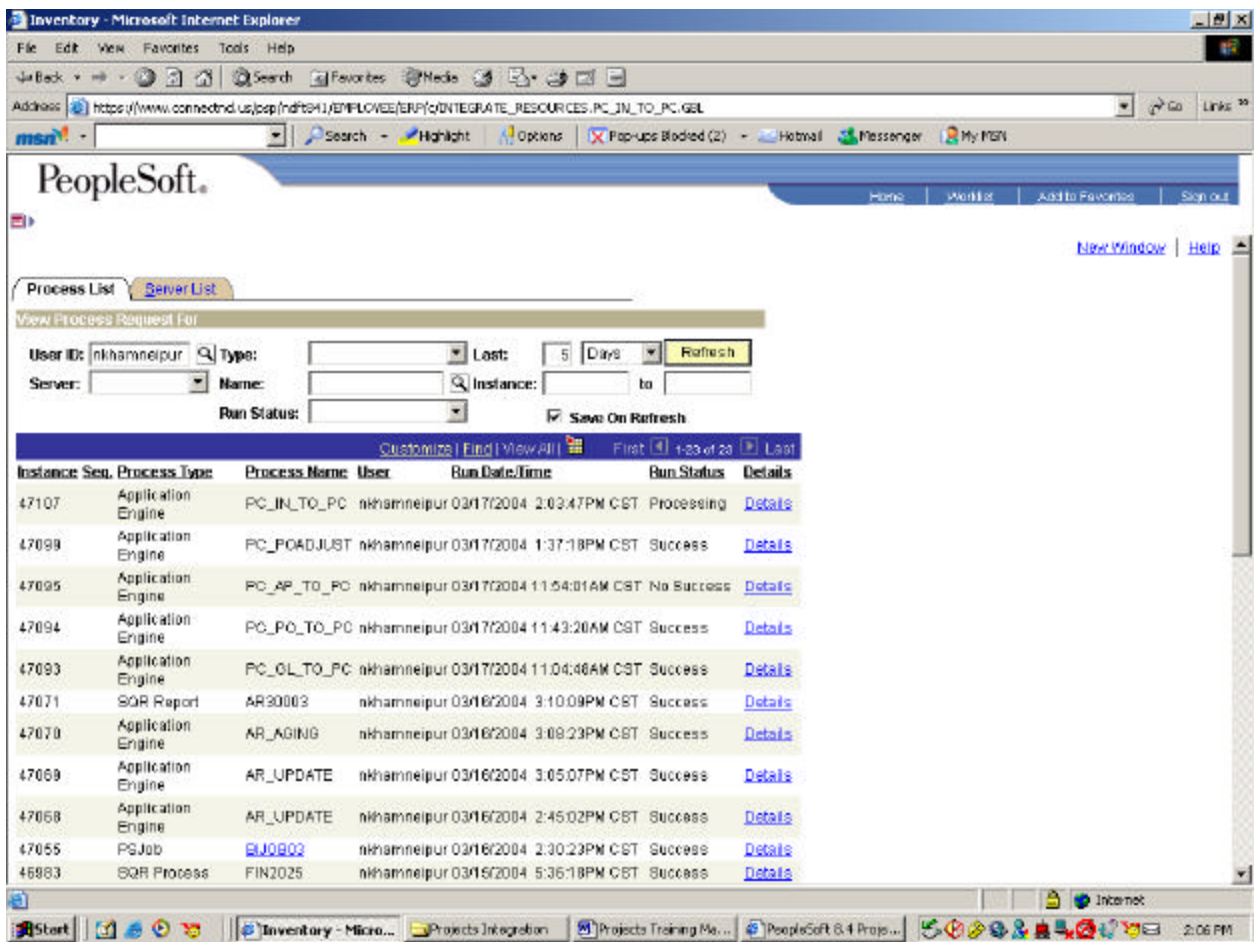
*BUProjAct Option: Selected Business Unit Request Number: 1 [Proj Resources](#)

Business Unit: 11000 Date Option: All

Done

Start Inventory - Micro... Projects Integration Projects Training Me... PeopleSoft 8.4 Proj... 2:04 PM

- Click the [Process Monitor](#) hyperlink to view the status of the process.



Inventory - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/EMP/c/INTEGRATE_RESOURCES/PC_INL_TO_PC.GBL

PeopleSoft.

Home World Add to Favorites Sign out

New Window Help

Process List Server List

View Process Request For

User ID: nkhamneipur Type: Last: 5 Days Refresh

Server: Name: Instance: to

Run Status: Save On Refresh

Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
47107	Application Engine	PC_INL_TO_PC	nkhamneipur	03/17/2004 2:03:47PM CST	Processing	Details
47099	Application Engine	PC_POADJUST	nkhamneipur	03/17/2004 1:37:18PM CST	Success	Details
47095	Application Engine	PC_AP_TO_PC	nkhamneipur	03/17/2004 11:54:01AM CST	No Success	Details
47094	Application Engine	PC_PO_TO_PC	nkhamneipur	03/17/2004 11:43:20AM CST	Success	Details
47093	Application Engine	PC_OL_TO_PC	nkhamneipur	03/17/2004 11:04:46AM CST	Success	Details
47071	SQR Report	AR30003	nkhamneipur	03/16/2004 3:10:09PM CST	Success	Details
47070	Application Engine	AR_AGING	nkhamneipur	03/16/2004 3:09:23PM CST	Success	Details
47069	Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 3:05:07PM CST	Success	Details
47068	Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 2:45:02PM CST	Success	Details
47055	PSJob	BJ0902	nkhamneipur	03/16/2004 2:30:23PM CST	Success	Details
46983	SQR Process	FIN2025	nkhamneipur	03/16/2004 5:36:18PM CST	Success	Details

Start Inventory - Micro... Projects Integration Projects Training Me... PeopleSoft 6.4 Proje... 2:06 PM

- Click on [Go Back to Inventory](#) hyperlink to return to the process page.

Inventory - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Go Back Forward Stop Home Search Favorites Media Print Mail News RSS

Address https://www.connectnd.us/psp/ndf5411/EMPLOYEE/EMP/c/INTEGRATE_RESOURCES.PC_IN_TO_PC.GBL Go Links

msn Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My MSN

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Home My Portal Add to Favorites Sign out

[New Window](#) [Help](#)

Inventory

User ID: nkhamelpur Run Control ID: nkinv [Process Monitor](#)

Program Name: PC_IN_TO_PC Process Frequency: Always

First (View All) First 1 of 1 Last

*BUProj/Act Option: Request Number: 1 [Proj Resources](#)

Business Unit: Date Option: All

Done

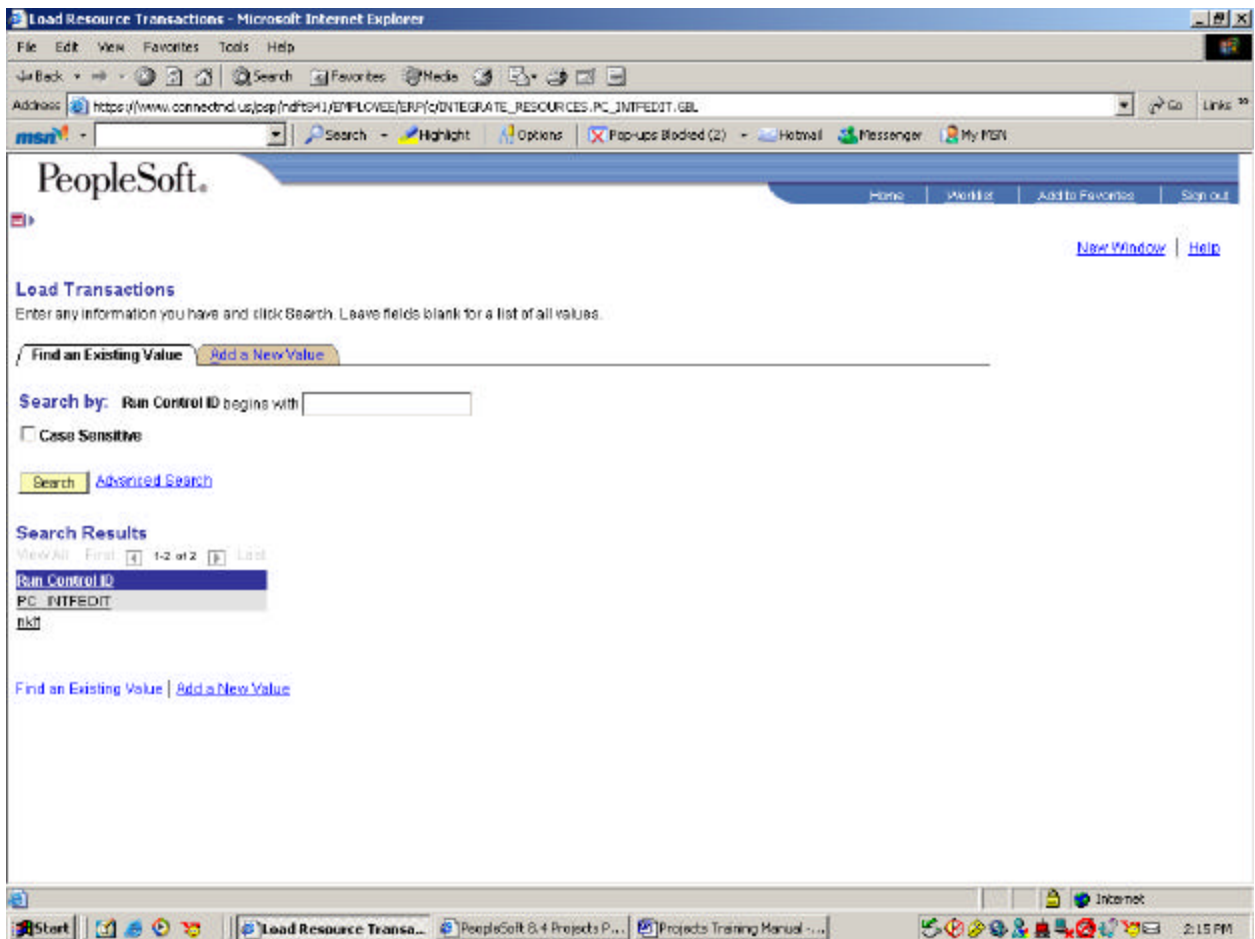
Start Inventory - Micro... Projects Integration Projects Training Me... PeopleSoft 8.4 Proj... 2:06 PM

Note: This process will create ‘ACT’ analysis types.

Load Resource Transaction Process

Projects > Third Party Integration > Load Resource Transactions

- Enter your unique Run Control.



- If you do not have a Run Control established, please set one up using the 'Add a New Value' tab.

Load Resource Transactions - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_INTFEDIT.GBL

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[New Window](#) [Help](#)

Load Transactions

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

Program Name:

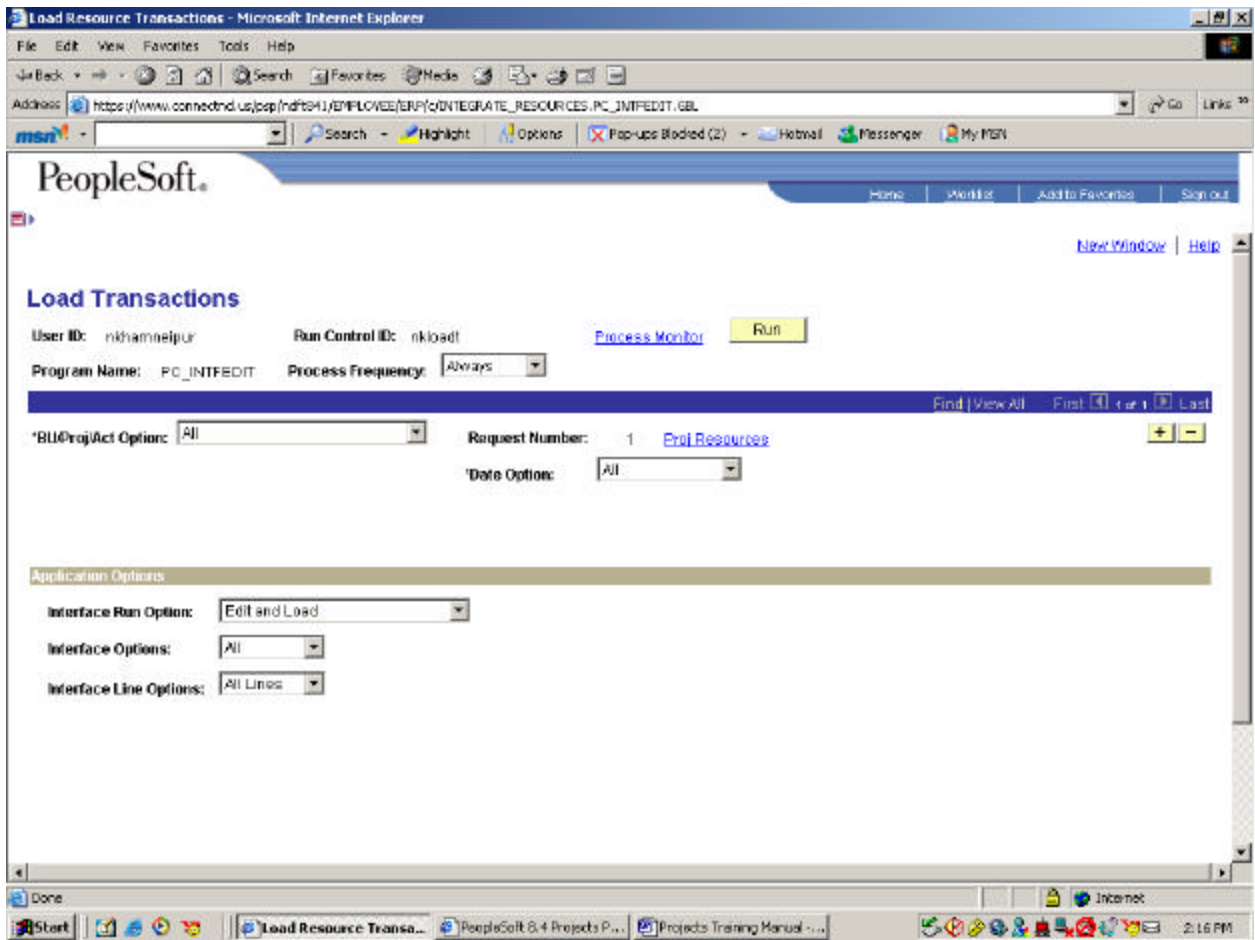
[Find an Existing Value](#) [Add a New Value](#)




Done

Start Load Resource Transa... PeopleSoft 8.4 Projects P... Projects Training Manual ~...

Internet 2:16 PM

- Enter your Run Control ID.
- Click .

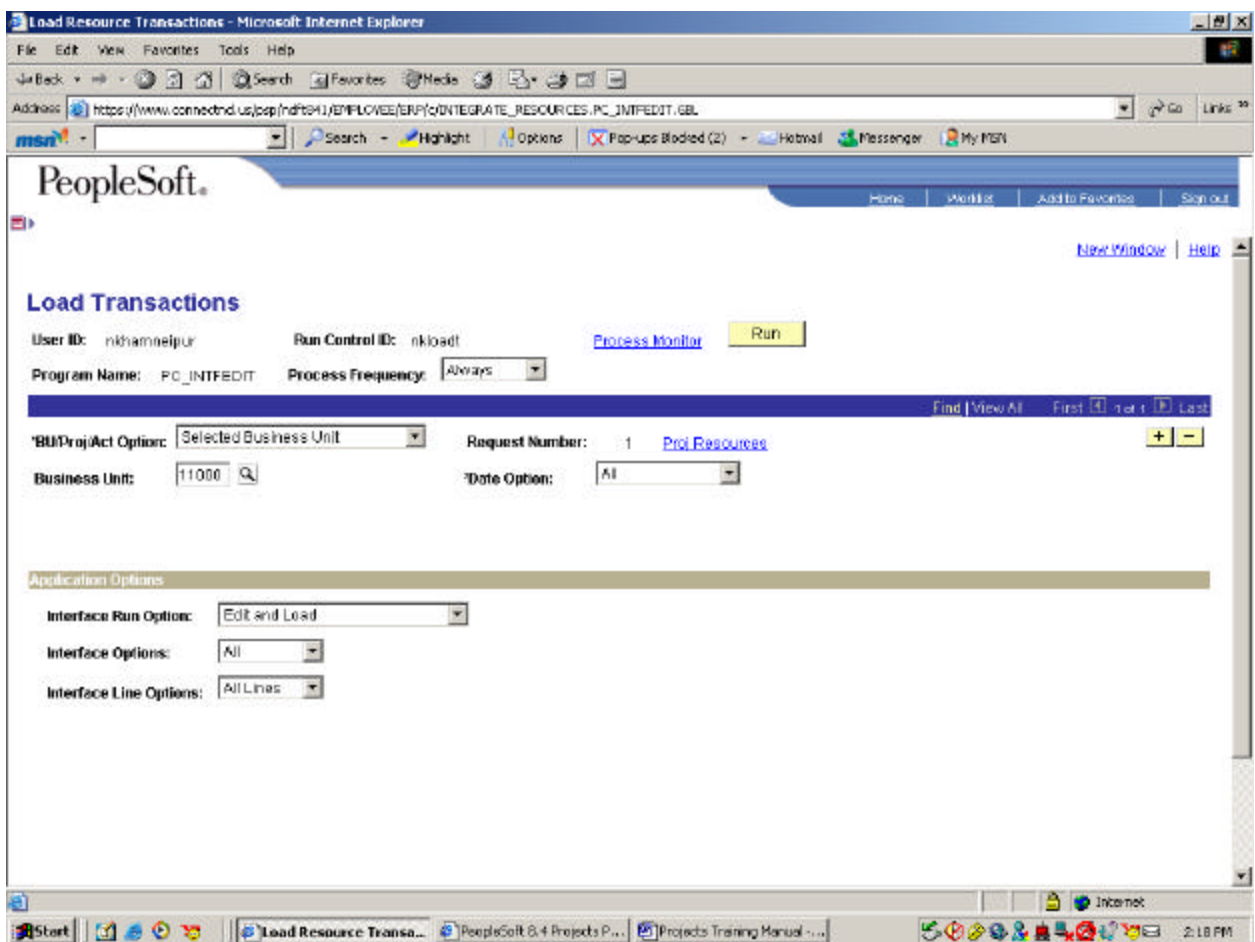


- Business Unit / Project Activity Option:
 - All
 - Selected Business Unit: Enter the appropriate Business Unit. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project: Enter the appropriate Business Unit and Project. Click the magnifying glass icon  to search for valid values.
 - Selected Business Unit / Project / Activity: Enter the appropriate Business Unit, Project and Activity. Click the magnifying glass icon  to search for valid values.
- Date Type:
 - All
 - Accounting Date: Enter the appropriate Date Range.
 - Transaction Date: Enter the appropriate Date Range.
- Application Options:
 - Interface Run Options:

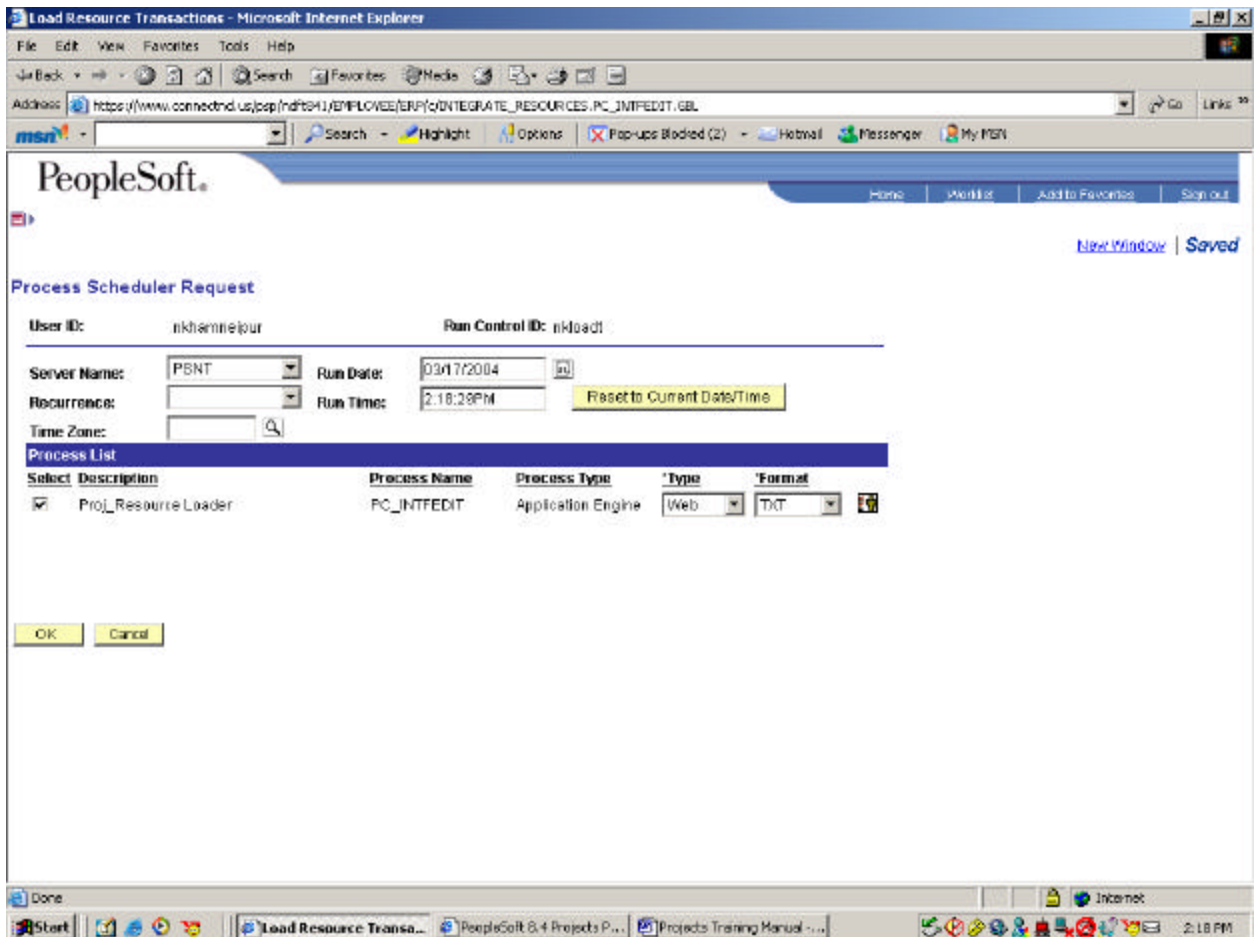
- Edit and Load
- Edit Only
- Load Only
- Update Only

- Interface Options:
 - All
 - Range

- Interface Line Options
 - All Line
 - Range



- Click 



Load Resource Transactions - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/csp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_INTFEDIT.GBL

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[New Window](#) | [Saved](#)

Process Scheduler Request

User ID: nkhammejour Run Control ID: nkload1

Server Name: PSNT Run Date: 03/17/2004

Recurrence: Run Times: 2:18:28PM [Reset to Current Date/Time](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	Proj_Resource Loader	PC_INTFEDIT	Application Engine	Web	TXT

[OK](#) [Cancel](#)

Done

Start Load Resource Transa... PeopleSoft 8.4 Projects P... Projects Training Manual ~...

Internet 2:18 PM

- Select the appropriate **Server Name:**
- Select the Proj_Resource Loader checkbox.
- Click [OK](#) to run the process.

Load Resource Transactions - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_INTFEDIT.GBL

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New Window Saved

Load Transactions

User ID: nkhameipur Run Control ID: nloadt [Process Monitor](#)

Program Name: PC_INTFEDIT Process Frequency: Always Process Instance: 47109

Find | View All First 1 of 1 Last

*BU/Proj/Act Option: Selected Business Unit Request Number: 1 [End Resources](#)

Business Unit: 11000 Date Options: All

Application Options

Interface Run Option: Edit and Load

Interface Options: All

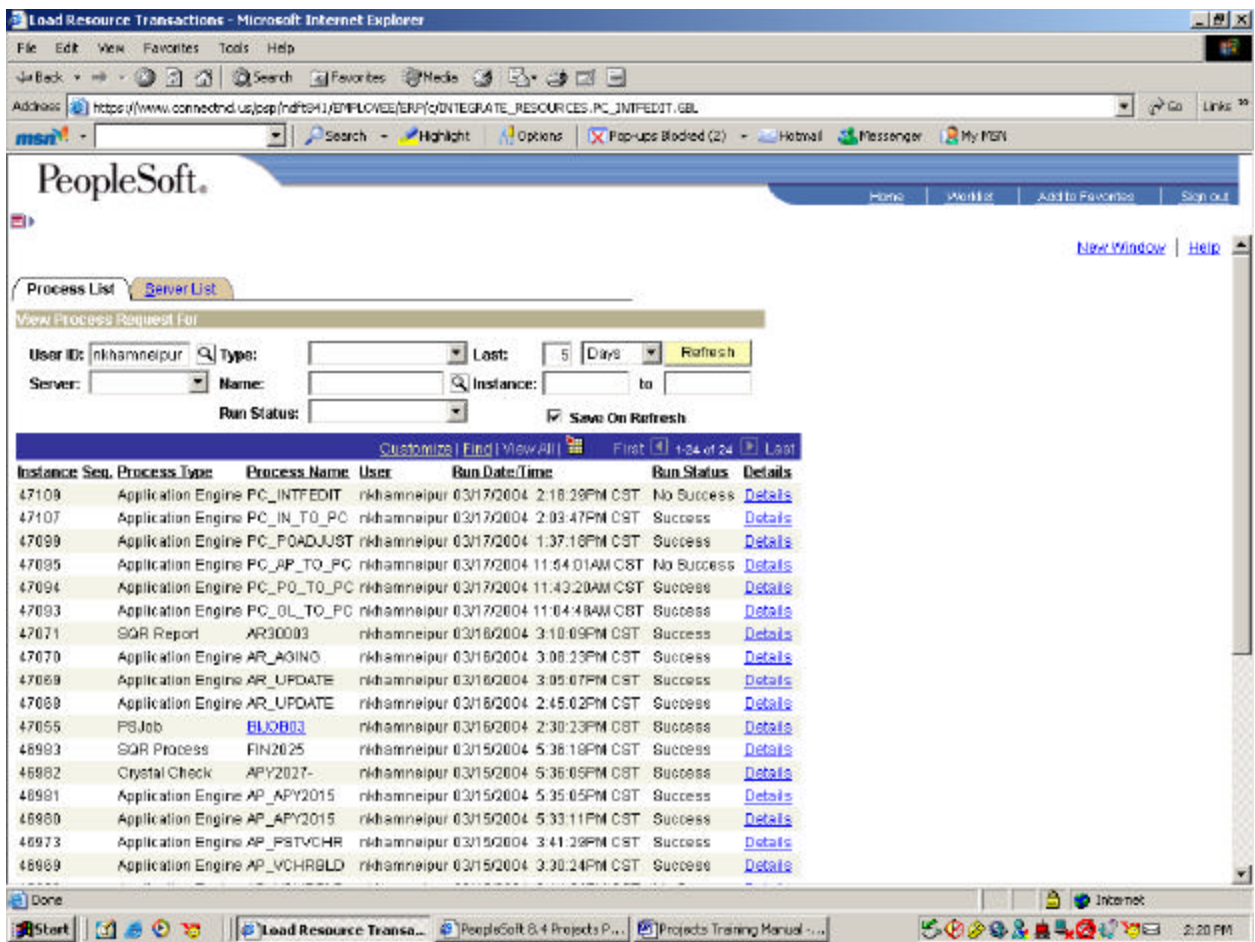
Interface Line Options: All Lines

Done

Start Load Resource Transa... PeopleSoft 8.4 Projects P... Projects Training Manual ~...

Internet 2:19 PM

- Click the [Process Monitor](#) hyperlink to view the status of the process.



PeopleSoft

Process List **Server List**

View Process Request for

User ID: Type: Last: Days
 Server: Name: Instance: to
 Run Status: ☒ Save On Refresh

Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
47109		Application Engine	PC_INTFEDIT	nkhamneipur	03/17/2004 2:18:28PM CST	No Success	Details
47107		Application Engine	PC_IN_TO_PC	nkhamneipur	03/17/2004 2:03:47PM CST	Success	Details
47099		Application Engine	PC_POADJUST	nkhamneipur	03/17/2004 1:37:18PM CST	Success	Details
47095		Application Engine	PC_AP_TO_PC	nkhamneipur	03/17/2004 11:54:01AM CST	No Success	Details
47094		Application Engine	PC_PO_TO_PC	nkhamneipur	03/17/2004 11:43:20AM CST	Success	Details
47093		Application Engine	PC_OL_TO_PC	nkhamneipur	03/17/2004 11:04:48AM CST	Success	Details
47071		SQR Report	AR30003	nkhamneipur	03/16/2004 3:10:09PM CST	Success	Details
47070		Application Engine	AR_A3INO	nkhamneipur	03/16/2004 3:08:23PM CST	Success	Details
47069		Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 3:05:07PM CST	Success	Details
47068		Application Engine	AR_UPDATE	nkhamneipur	03/16/2004 2:45:02PM CST	Success	Details
47055		PSJob	BLU0003	nkhamneipur	03/16/2004 2:30:23PM CST	Success	Details
46993		SQR Process	FIN2025	nkhamneipur	03/15/2004 5:38:18PM CST	Success	Details
46982		Crystal Check	APY2027-	nkhamneipur	03/15/2004 5:36:05PM CST	Success	Details
46981		Application Engine	AP_APY2015	nkhamneipur	03/15/2004 5:35:05PM CST	Success	Details
46980		Application Engine	AP_APY2015	nkhamneipur	03/15/2004 5:33:11PM CST	Success	Details
46973		Application Engine	AP_PSTVCHR	nkhamneipur	03/15/2004 3:41:28PM CST	Success	Details
46969		Application Engine	AP_VCHRBLD	nkhamneipur	03/15/2004 3:30:24PM CST	Success	Details

- Click on [Go Back to Load Transactions](#) hyperlink to return to the process page.

Load Resource Transactions - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://www.connectnd.us/jsp/ndf041/EMPLOYEE/ERP/c/INTEGRATE_RESOURCES_PC_INTFEDIT_GBL

msn Search Highlight Options Pop-ups Blocked (2) Hotmail Messenger My MSN

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New Window Help

Load Transactions

User ID: nkthamelpur Run Control ID: nkloadt [Process Monitor](#) [Run](#)

Program Name: PC_INTFEDIT Process Frequency: Always

Find View All First 1 of 1 Last

*BU/Proj/Act Option: Selected Business Unit Request Number: 1 [End Resources](#)

Business Unit: 11000 Date Options: All

Application Options

Interface Run Option: Edit and Load

Interface Options: All

Interface Line Options: All Lines

Done

Start Load Resource Transa... PeopleSoft 8.4 Projects P... Projects Training Manual ... 2:21 PM